



The Smith Fund
Volunteer Manual
2017-2018

November 6, 2017

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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.

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

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.

- 58% of the class of 2021 received 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.
- Smith has a low student-faculty ratio of 9:1.
- 4 in 10 Smith students major in the 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".
- 18% of Smithies in the 2017-2018 school year are first generation college students; 33% are students of color.

Visit: 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 gifts to The Smith Fund which give the college flexibility each year to meet the emerging needs of students, faculty, programming, and physical spaces.

Many donors like to give to a specific need that aligns with their values or resonates with their individual Smith experience. Please let your contacts know that their Smith Fund gifts can be directed to the following areas of need:



The Smith Fund (General): *Meets the college's most urgent needs.*

The Smith Fund is a driving force on campus. 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: *Fuels financial aid and campus life.*

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: *Supports curricular innovation, faculty, humanities, and the arts.*

At Smith, educating the 21st 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: *Supports internationally focused programming.*

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: *Funds green initiatives.*

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.

Inclusive Smith: *Supports initiatives that promote diversity, equity, and inclusion.*

Smith's community flourishes when it is as rich and diverse as the world itself. When you give to Inclusive Smith, you support initiatives that engage, connect, and embrace underrepresented

students. More importantly, you help create the shared sense of belonging that makes Smith — and Smithies—strong.

Resourceful Smith: *Supports the exciting Neilson Library redesign project as well as ongoing programming and operations.*

A hub of activity on campus, Neilson Library is a unifying space where teaching, learning and community collide. Smith is in the midst of advancing Neilson for 21st century students with extensive renovations led by acclaimed designer Maya Lin. Be a part of this important initiative by designating your Smith Fund give to Resourceful Smith.

Ada Comstock Scholarship: *Supports financial aid specifically for Ada Comstock Scholars.*

The Importance of Participation:

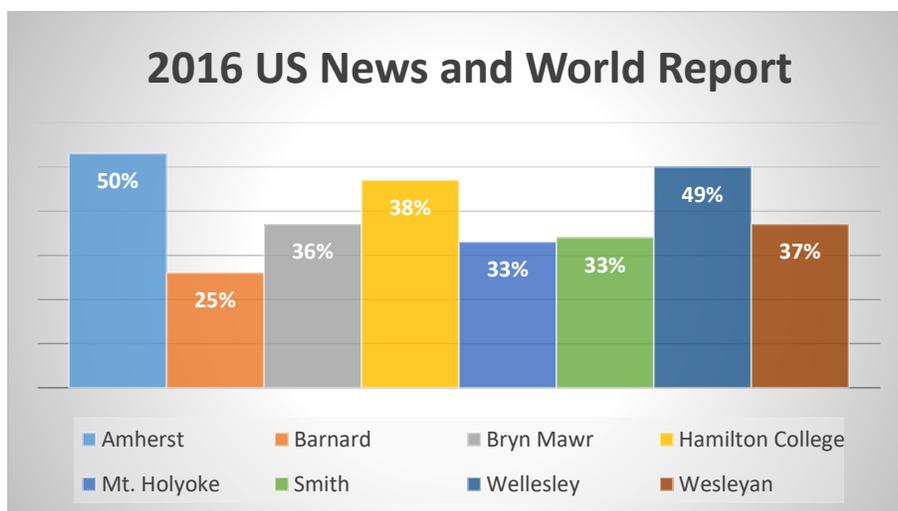
Annual support is viewed as a measure of satisfaction in an institution. Participation is taken into account by high school seniors and their families when evaluating colleges, by corporations and foundations when awarding grants, and by other donors when making their philanthropic decisions.

In its 2016 issue (published in fall 2015), *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.



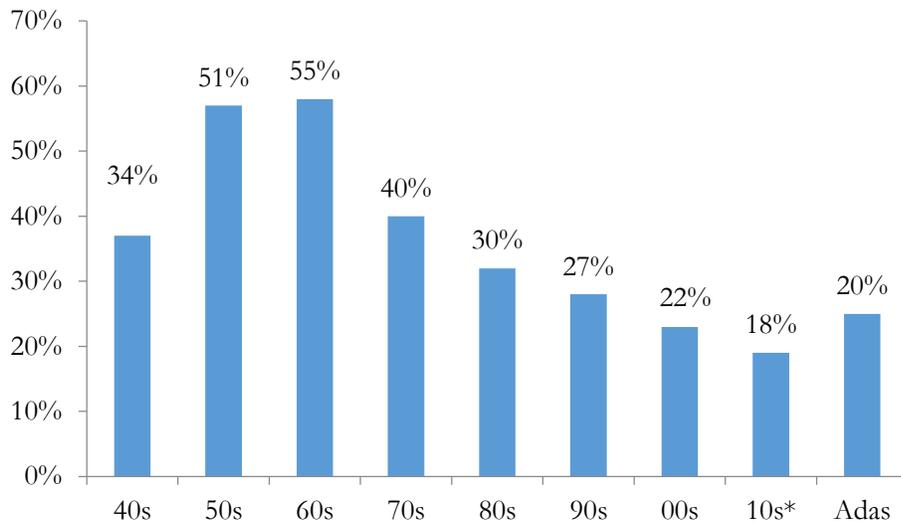
Every gift counts!

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.

How does my decade's participation compare to others?

FY17 Average Participation by Decade

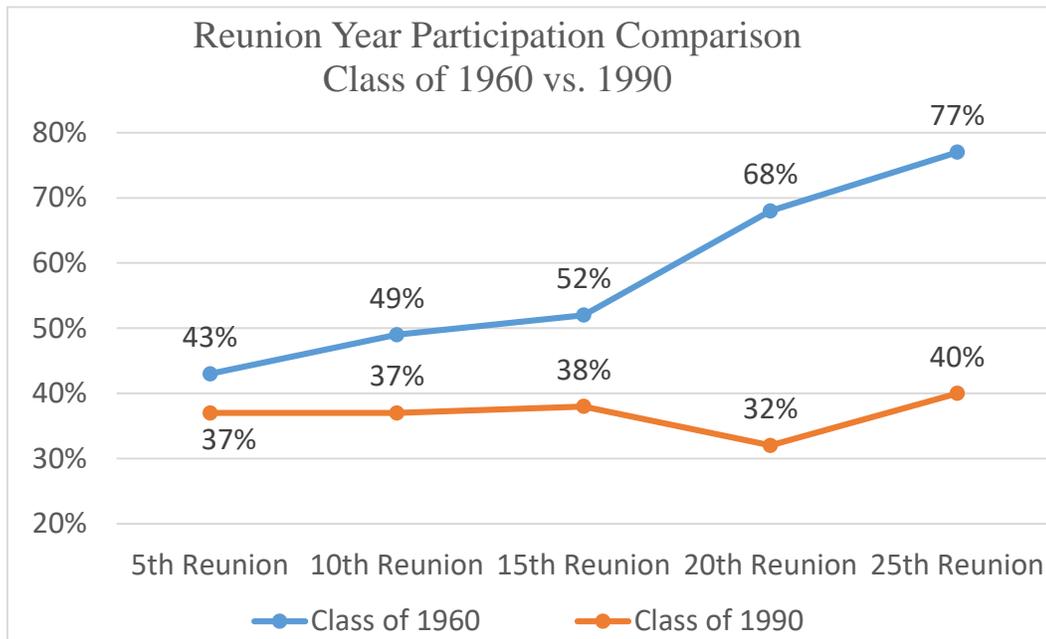


**Note: 10s participation does not include current students.*

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 over \$500,000 each year!



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.

Encourage 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.



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:

- Act as the main point of contact between the rest of the class fund team and your Smith Fund staff liaison.
- Help draft and sign the Smith Fund related communications and appeals to the class.
- Co-chair class fundraising calls with staff liaison.
- Contact and establish a relationship with all fund team members and key classmates.
- Mentor the class fund and special gift agents, as applicable.
- Engage and solicit Smith Fund support for the other members of your fundraising team, and other assigned classmates who make gifts.
- Follow up with an appreciative thank you when gifts are received.
- Attend training webinars and conferences, as applicable.
- Share college and Smith Fund related content on social media
- Give consistently to The Smith Fund each year.

Class Fund Agent: The duties and responsibilities of the Class Fund Agent are:

- Engage and solicit Smith Fund support from approximately 20 assigned classmates
- Thank assigned classmates who make gifts
- Attend training webinars and conferences, as applicable
- Share college and Smith Fund related content on social media
- Engage with other class volunteers, as applicable, via phone or email groups.
- Support The Smith Fund each year.

Special Gift Agent: The duties and responsibilities of the Special Gift Agent are:

- Engage and solicit Smith Fund support from approximately 20 assigned classmates with the capacity to support and college at the Sophia Smith Leadership Society level (\$1875+).
- Thank each donor for her gifts to Smith.
- Attend training webinars and conferences, as applicable.
- Engage in conversations and activities with classmates to strengthen their affiliation with Smith.
- Share Smith Fund related content on social media.
- Give a leadership gift of \$1875+ to The Smith Fund each year.

Class Ambassador: Class Ambassadors participate in Smith's fundraising efforts without directly soliciting others. The duties and responsibilities of the Class Ambassadors are:

- Contact and establish a relationship with an assigned group of classmates.
- Communicate with 20 assigned 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.
- Attend training webinars and conferences, as applicable.
- Share Smith Fund related content on social media.
- 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. The duties and responsibilities of the Class Steward are:

- Maintain a relationship with a group of classmates by thanking them for their support every fiscal year when a gift is received.
- Attend training webinars and conferences, as applicable.
- Give consistently to The Smith Fund each year.

Memorial Chair: The duties of the Memorial Chair are:

- Write thank you notes to acknowledge Smith Fund memorial gifts credited to the class.
- Write letters of condolence to families when informed of classmate' deaths.
- Research names and addresses of next-of-kin of deceased classmates.
- In the reunion year, write letters to classmates and next-of-kin of deceased classmates to invite memorial gifts.
- 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, Instagram, or LinkedIn. The duties and responsibilities of the Social Media Ambassador are:

- Share college, class and Smith Fund related content on social media.
- Attend training webinars and conferences, as applicable.
- Engage with other class volunteers, as applicable, via phone or email groups.
- Support the Smith Fund each year.

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 30th) 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 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.

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 Circle**, for annual donors of \$10,000 to \$24,999
- **Paradise Circle**, for annual donors of \$5,000 to \$9,999
- **1875 Founder's Circle**, 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 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: Search “Smith Fund Volunteers” and join our group.
- 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: This page has tools for all volunteers including speaking points about Smith.
- 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: Here you can find information on clubs, travel, events, and more.
- 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? This is 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 and has a CVC code of XXX. 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. My email address is #####@###.com, and my number is ###-###-#####. 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 23rd 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. **3rd 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 (3rd 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

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

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
						Solicitation	IMO and IHO						
	9900000001 Rachel Jones (A) 1966 SCAL Salutation: Rachel Jones 1 Main Street Boston, MA Rachel123@smith.edu	Ask Amt:\$1,000.00 Last Year Smith Fund\$100.00 Current Year Smith Funds\$200.00	2084164	Pledge	Mar 23, 2016	AF-16 025100 The Smith Fund	IMO and IHO	\$200.00					
	9901000000 Nancy Smith (A) 1966 SCAL Salutation: Ms. Smith 33 Elm Street Northampton, MA nancy.smith@smith.edu Preferred(555) 555-5555	Ask Amt:\$2,500.00 Last Year Smith Fund\$120.00 Current Year Smith Funds\$560.00	00000000 2486127	Gift Check	Mar 30, 2016 Mar 30, 2016	AF-16 025100 The Smith Fund AF-Gif, Non-Smith Env IMO Sophia Smith			\$50.00		\$10.00		The Hank & Wendy Williams Trust
	9902000001 Wendy Williams (A) 1966 SCAL Salutation: Mrs. Williams 2 Maple Street Boston, MA williams@smith.edu Preferred(555) 555-5555	Ask Amt:\$5,000.00 Last Year Smith Fund\$100.00 Current Year Smith Funds\$10.00	00000000 2486139	Pledge Payment Soft Credit Recen Check	Mar 30, 2016 Mar 30, 2016	AF-16 025100 The Smith Fund Trust, Foundation, Donor Advis IMO Sophia Smith					\$10.00		The Hank & Wendy Williams Trust
	9900100004 Diana McDonald (A) 1966 SCAL Salutation: Mrs. McDonald 1 Palm Street Miami, FL	Ask Amt:\$500.00 Last Year Smith Fund: Current Year Smith Funds\$250.00	00000000 2485711	Gift Credit Card Onlin	Mar 22, 2016 Mar 28, 2016	AF-16 025100 The Smith Fund Gifts through CrowdFunding					\$250.00		
	990000100001 Victoria Samuels (A) 1966 SCAL Salutation: Vicky 17 W. 65th St New York, NY vicky_samuels@smith.edu	Ask Amt:\$2,500.00 Last Year Smith Fund\$11,000.00 Current Year Smith Funds\$250.00	00000000 2486350	Gift Credit Card	Mar 29, 2016 Mar 31, 2016	CC16 441840 Friends of the Museum Museum New Member Campaign					\$150.00		

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

The Class Management Report (a.k.a. CMR)

The CMR is a volunteer tracking tool that will be sent to volunteers monthly. This document allows you to view all classmates that you are linked to (responsible for soliciting and thanking) and the progress on their giving throughout the fiscal year (July 1-June 30).

What's in each column?

- **Banner ID:** A unique identifier that all entities in our database are assigned. Most alumnae that you work with will not be aware of the id#, this is for Smith College internal use only.
- **Name:** Prospect's Name.
- **Donor category:** SCAL = Smith College Alumna, SCND = Smith College Alumna No Degree. These codes are for internal use only.
- **Ask Amount:** This is the target ask for The Smith Fund.
- **Count:** This simple indicates how many links a volunteer has. The total of links will be tallied up at the bottom of the column. For example, Sophia Smith has 9 links, per this example.
- **AF Donor/Pledger Count:** This indicates how many links are donors or have made pledges to The Smith Fund to date. In this example, Sophia Smith has 5 links that have either a gift or a pledge to The Smith Fund. If you have a gift in the system, you are considered a donor. If you have a pledge, you are not considered a donor until that gift is paid or partially paid.
- **AF Donors Only Count:** Indicates how many of Sophia's links have made a gift this fiscal year to date.
- **Comprehensive Donor/Pledger Count:** This column take into consideration gifts and pledges made to areas outside as well as to the The Smith Fund.
- **AF Gift Total:** This column represents total cash in the door for The Smith Fund.
- **AF Pledge Balance:** This column represents total pledge balances to The Smith Fund only.
- **Reunion Bequest Intentions:** If a bequest intention has been documented for the purpose of being counted in the reunion totals, the dollar amount will show up in this column. In this example, Deidre Douglas Kieffer has a \$50,000 bequest intention, and that is represented in the Bequest column as well as in the Comprehensive total.
- **AF Commitment:** This column represents all Smith Fund commitment of cash and pledges. In this example, there are no pledges, so the total commitment is all cash in the door.
- **Comprehensive Total:** This column represents all commitments booked for the current fiscal year including Smith Fund gifts and pledges, bequest intentions being counted toward reunion totals, and other gifts made during this time that are not bequests or Smith Fund, but will still count toward class totals. In this example, Suzanne Boh Bunning has total Smith Fund gifts of \$10,000 but her comprehensive total is \$110,000. This means that Suzanne has a \$100,000 commitment that is not a bequest, but is a gift to Smith that is not for The Smith Fund.

**SF Class
Management
Report**

Details by Volunteer - Campaign Year 2017

Smith College Advancement Division
CONFIDENTIAL - DO NOT DISTRIBUTE
This is a recognition report

Volunteer: **Sophia Smith** SGC Class of **1995**

Banner ID	Name	Donor Cat	Ask Amount	Count	AF Dir- Pldgr Ct	AF Dnts only Ct	Comp Dir- Pldgr Ct	AF Gift Total	AF Pig Balance	Reunion Request Intentions	AF Commitment	Comprehensive Total
12345	Bush, Teresa Daley	SCAL	\$1,000.00	1	0	0	0					
23656	Bunning, Suzanne Boh	SCAL	\$50,000.00	1	1	1	1	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$110,000.00
65487	Clary, Virginia Bogart	SCAL	\$10,000.00	1	1	1	1	\$2,065.14	\$0.00	\$0.00	\$2,065.14	\$2,065.14
45687	Kelley, Karen Howard	SCAL	\$1,875.00	1	0	0	0					
13313	Kieffer, Deirdre Douglas	SCAL	\$5,000.00	1	1	1	1	\$500.00	\$0.00	\$50,000.00	\$500.00	\$50,500.00
15798	Keller, Mary Dickson	SCAL	\$5,000.00	1	1	1	1	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00
65498	Marchant, Marilyn Bondi	SCAL	\$1,000.00	1	1	1	1	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00
65411	Neville, Jennifer Smith	SCND	\$1,000.00	1	0	0	0					
10249	Des Jardins, Barbara Gorski	SCAL	\$5,000.00	1	0	0	0					
Sophia Smith - Total			\$79,875.00	9	5	5	5	\$14,565.14	\$0.00	\$50,000.00	\$14,565.14	\$164,565.14

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]

9903 [REDACTED] / 6FPCF

Business: Viola Player

Jean [REDACTED]

Employer: Portland Symphony Orchestra

9 [REDACTED]
Kittery Point, ME 03905

Portland Symphony Orchestra
Portland, ME 04104

Preferred Phone: (207) [REDACTED]:

Work Phone:

Ask Amount: \$500.00

Smith Major: Music

Salutation: Jean

Senior House: Lawrence House

Email: [REDACTED]

Smith Activities and Volunteer Positions:

Spouse/Partner: [REDACTED]

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

S/P Business: Counselor/Lay Minister No employer given

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)

Other Responses:

1. Credit/Debit Card Gift of \$ _____ (amount)
AND/OR Bill credit card for \$ _____ in months of _____

Will give this fiscal year, but would not specify amount

Already sent gift

Credit Card Information: Visa MasterCard Discover American Express

Number disconnected/wrong (note details at phone above)

Name on Card _____ Exp. Date _____

No (note reason in contact notes)

Card #:

Contact notes (more space available on back): _____

2. Pledge of \$ _____ (amount)

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

The Smith Fund

Thank you for your commitment of \$ _____

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

Make your gift online at www.smith.edu/thefund

6FPCF [REDACTED]

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

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.

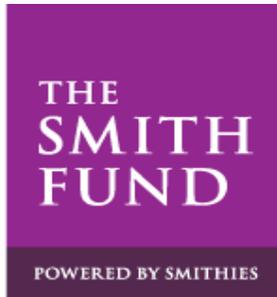
Staff Liaison: This is the staff person in The Smith Fund who is assigned to your efforts and your staff point person. Your staff liaison will reach out to you regularly with information, updates, and materials. Contact your staff liaison with any questions you have about The Smith Fund.

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.



FY2017 - 2018 Volunteer Calendar

Thank you for your work as a Smith Fund volunteer! Our volunteers are the backbone of our fundraising efforts at The Smith Fund, and their tireless dedication is how Smith is able to raise millions of dollars each year in support of the college.

As a volunteer, you will be working closely with the Smith Fund office on campus. While you are making outreach to your assigned contacts, we are thinking of creative ways to reach our donors, boost class participation, and help you succeed with your volunteering.

September – November:

Volunteers: Visit Smith's news site to find up-to-date information to share with your contacts, reach out to your assigned contacts, use social media to promote any Smith Fund news of giving challenges, thank anybody who has given so far.

Smith Fund Staff: Mailing appeals to non-donor alumnae, special outreach to reunion years begins, student phonathon is underway.

December:

Volunteers: Continue to reach out to your assigned contacts, use the upcoming tax-year-end as an important incentive for your contacts who have not given yet. Thank all your contacts that have given. Promote Smith Fund news on Social Media.

Smith Fund Staff: Calendar year-end appeals go out in the mail and email.

January:

Volunteers: Continue to reach out to your contacts who have not yet given. Thank those that gave at the calendar-year-end.

Smith Fund Staff: Thank you emails are sent to donors, Reunion Class appeals are sent.

February:

Volunteers: Call up to thank donors who have given. Review your contact sheets and connect with non-donors.

Smith Fund Staff: Non-donor appeal is being mailed, student phonathon resumes.

March-April:

Volunteers: This is prime-time for reunion fundraising! Pay close attention to individuals who have registered but still have not given. Keep connecting with non-reunion and non-donors who still have not made a gift. Make sure that all donors have been thanked.

Smith Fund Staff: The staff is focused on reunion giving, students are still reaching out through the phonathon.

May:

Volunteers: Prime time for reunion fundraising continues, especially for those who have registered but still have not given.

Smith Fund Staff: "Last Chance" appealed mailed to non-reunion alumnae, reunion mailing to all reunion years.

June:

Volunteers: Use social media to promote any Smith Fund news or giving challenges. Assist Smith Fund staff in following-up with classmates who have pledged but have not yet paid. Make sure all donors who have given in FY18 are thanked!

Smith Fund Staff: Fiscal year-end appeals and email appeals sent, phone calls being made to non-donors, pledge reminder calls made.



Your Class Managers & Program Assistants for 2017-2018 are:

<u>Class</u>	<u>Class Manager</u>	<u>Program Assistant</u>
1944-1954	Barbara Rejniak brejniak@smith.edu (413) 585-2063	To be hired
1968	Allison Gomes agomes@smith.edu (413) 585-2661	Trish (Patricia) Gaspar pgaspar@smith.edu (413) 585-2057
1969-1972 & 1958-1972	Jodi Fallon Fern ifallonfern@smith.edu (413) 585-4407	To be hired
1955-1957 & 1963-1967 & 1973-1982 & Ada Comstock	Sharon Looney-Armstrong slooneyarmstrong@smith.edu (413) 585-2068	To be hired
1993-1997 & 1983-1987	To be hired	To be hired
1988-1992 & 1998-2007	Jennifer Smedes jsmedes@smith.edu (413) 585-2039	To be hired
2008-2017 & Senior Class	Katie Averill kaverill@smith.edu (413) 585-2698	To be hired
Smith Fund Director	Maria Held mheld2@smith.edu (413) 585-2044	