On behalf of Smith School of Business, I would like to thank you for volunteering to lead your Class Giving Campaign. Class Giving is an important tradition at Smith School of Business (SMITH). We depend on the generous gifts from classes to fund our programs, renovations (such as the Goodes Hall expansion), and provide financial assistance to students. Class Giving Campaigns are a powerful way to collectively give back to Smith School of Business in recognition of a milestone anniversary of your graduation and to create a legacy for your class.

Class Giving Volunteer Handbook

Winter 2015
Without the generous help from students and alumni, many of our programs, scholarships, and upgrades would not be possible. Philanthropy at Smith accounts for approximately 10% of the School’s revenue, which is equivalent to the amount of government funding provided.

This document has been compiled to share information and best practices from previous successful Class Giving Campaigns. We hope it will provide you with useful tips and tools to execute an effective and successful Class Giving Campaign.

**Class Giving Campaigns at Smith have two distinct elements:**
1. Leadership Campaign
2. Mass Appeal Campaign

This document will thoroughly explain each aspect involved in a Class Campaign, including volunteer responsibilities, class giving timeline, solicitation strategies, and tips to help get you started.

Our team is always here to help you along the way, so please call us at any time with questions or concerns. Thank you again for your continued commitment to Smith.

Best Wishes,

**Cicely Johnston**  
Relationship Manager  
Annual & Reunion Class Giving  
cicely.johnston@queensu.ca  
613.533.2923
Class Giving Overview

Class giving is a strong tradition at Smith School of Business (Smith), especially in line with graduation, and milestone reunion years. As students and alumni recall their fond memories of their time at Smith and reflect on their lives, it is fitting to mark a graduation or reunion and give back to the School that has helped shape their lives.

Smith School of Business relies on Class Giving Coordinators (CGC) to liaise with and rally class support. These include unrestricted gifts to Smith, to individual endowed and funds, or class projects. The Classes and Reunion Giving Relationship Manager (RM) and the CGC will set goals for each class. Each class will have dollar and participation goals. Goals will be based on class giving history, capacity and past results. To achieve these goals each classmate will be asked to consider a stretch gift in a form of a multi-year commitment or an outright gift.

There are three overall goals for class giving:

- Maximize the philanthropic potential of the class
- Increase class participation
- Increase engagement in Smith
**Class Giving Process**

Class Giving Campaigns go through various iterations dependent on the age and stage of the class.

**STUDENT PHILANTHROPY & GRADUATING CLASS CAMPAIGN**
- Becoming a Smith School of Business Alumni begins the moment you arrive at Goodes Hall and experience firsthand the educational opportunities made possible because of University donor support. Beginning the tradition of giving back starts as a student, through COMMITment Class Campaigns in Commerce, and Graduating Class Campaigns for Graduate Program students.
- Focus on engagement and participation.

**YOUNG ALUMNI**
- This includes alumni in the first 10 years.
- Focus on participation.

**CLASS GIVING**
- Alumni 10 years plus.
- While participation is still critical, focus more to greater financial goals.
- Key years are 25, 30, 35 and 40

**The Class Gift**

Classes may choose the designation of their gift. There are two designation options:

**OPTION #1: DESIGNATE TO A SPECIFIC CLASS FUND**
- Decide what your class would like to support based on the School’s fundraising priorities (i.e. Goodes Hall enhancement, student financial assistance, faculty fellowship, etc.)
- Create a class fund and rally your classmate’s support around designating their gift to this particular fund. A fund can be endowed for $50,000.
- If the class fund raising goal is not met, the fund can become expendable or can be added to an existing endowed fund.

**OPTION #2: DESIGNATE TO ANY FUND**
- Encourage your classmates to make a gift to the School of Business towards any fund or existing interest and count the total amount given by your classmates for your campaign.
- Only gifts made with a Smith designation will be counted towards the class giving total.
- Individuals within a class year may give to another priority within Smith not set by their class. This gift will be recognized as part of the overall giving total for the class year.

*For example: John Smith gives $50K towards a scholarship, but his class has rallied around the expansion. John’s gift will not count towards funds raised for the expansion, but will count towards the total of gifts made by his class year.*
**Class Giving Goals**

Every CGC should work with the RM to create appropriate and attainable class giving goals. These goals will be based on historical and estimated class participation and giving capacity. Every class is unique, and therefore should have individual goals that best suits them.

**Class Giving Recommended Campaign Actions Plan**

The following provides a guideline for executing a Class Giving Campaign. Every class is unique and processes and timing may differ, however use this as a guide to keep the campaign on track.

1) **FORM A CLASS GIFT EXECUTIVE**

- Successful Class Giving requires leadership and drive.
  - Begin by approaching the existing permanent Class Executive, leaders, and connectors in the class, those who have stayed in touch with the classmates and have a passion for Smith School of Business.
  - This small group will lead the process, in partnership with Smith development staff.
  - Ensure that you set the expectation that this is a working group.
  - Also expectation to contribute financially to Campaign
- Establish a meeting schedule in the lead-up to your reunion.
  - For student class campaigns, bi-weekly is ideal.
- It is important to have the Committee in place as early as possible.
  - 12-18 months ahead is ideal for peer-to-peer leadership campaign.
- Have each Committee member complete peer screening with the RM to determine the connections among the class. Other class members may also be willing to perform peer screening, so please ask others, even if they are not part of the Committee.

2) **CREATE A CAMPAIGN INFO SHEET OUTLINING WHAT PROJECT YOU CHOOSE AND AT WHAT LEVEL**

- Have all the necessary information in a single document for all Committee members and donors.
  - You can embed pledge forms, and pictures of class website. Smith Development staff will assist you in building a compelling case for support explaining why your class should give back to Smith School of Business.
- This format lends itself well to covering off the main elements of the Class Gift.
  - For those in the financial sector, this format is the standard for raising funds, and is therefore likely familiar and can help people make an informed decision.
- It is also an efficient way to coordinate the intent of the Executive and Smith with regards to the following key decisions:
  - Use of proceeds – for a scholarship, bursary, capital fund, faculty member, etc.
  - Key levels of giving and associated recognition.
  - Next steps in the private vs. public phase.
3) **SECURE MAJOR AND KEY DONORS THROUGH A LEADERSHIP CAMPAIGN**

- Like any campaign, there are two main dimensions to the class gift campaign
  - Leadership Campaign – to generate leadership gifts to reach at least 90% of goal.
  - Mass Appeal – to create energy and excitement around the campaign and bring in the remaining 10% with participation being the focus.
- In most cases, the majority of funding will come from the leadership gifts of a small section of the class (student leaders, committee members, ComSoc executive, Class Agents, Boardroom Captains, etc.); this is done in a private-phase, before reaching out to the full class.
  - Identify those individuals early and ideally have a member of the Committee approach the classmate directly.
  - This should be coordinated closely with Smith development staff who can provide guidance and assistance in making peer-to-peer solicitations.
- Look to raise 80% of your target from leadership gifts, before making the public appeal to the Class. This can be applied for monetary or participation goals.
- It is important to build your relationship with members of the leadership group.
  - Offer additional information i.e. a personal meeting to walk through the Campaign’s details, if helpful.
  - Explain the levels of recognition, and the impact their gift will have to the students and programming at Smith.
- Ask your initial donors to ask others to donate. There is nothing more powerful than a peer-to-peer “ask.”

“When donors were surveyed in 2009 about how the economy had affected their philanthropy, 43% said they would still give if asked by a leadership volunteer or someone they knew personally.”

- Cygnus Applied Research Inc.
4) GENERATE CLASS PARTICIPATION THROUGH A PUBLIC PHASE

- With a least 90% of your class goal reached, you can engage the rest of the class in the campaign. If many of your classmates have already given, be careful not to contact them a second time.
- Class letter/package:
  - Solicitations typically begin with a class letter and some announcements (i.e. launch event, email, Facebook post, etc.).
  - A letter or email from classmates to classmates is an easy way to publicly launch the process.
  - Consider showing a picture of your class giving website to raise awareness and potentially drive traffic.
  - Enclose the Campaign Info Sheet.
  - Expect to follow-up with more e-mails to encourage people.

5) PROVIDE ONGOING REPORTING

- Every year work in conjunction with the Class Giving Relationship Manager to disseminate Stewardship Report to classmates which:
  - Showcases the impact of the money raised.
  - Outlines the overall financial health of the endowment (if applicable).
  - Promotes any social plans for the coming year.

Your Role as a Volunteer

Thank you for all of your work on behalf of Smith School of Business. We cannot do what we do without you! As a volunteer you will have a unique opportunity to connect with your classmates, fellow alumni, current students as well as the School of Business. Without our volunteers we would not be the prestigious institution that we are today.

Each class will have Class Giving Coordinators (typically one to three individuals – Class President, Class Agents, Class Leader, etc.) and a Class Giving Committee that will be comprised of individuals in the class that are willing to volunteer their time for class giving and Smith (there are no limits to the number of volunteers).
Volunteer Role Description

CLASS GIVING COORDINATOR
• Recruit volunteer(s) for Class Giving Committee (i.e. classmates, peers, etc.)
• Assist with goal setting (dollars and participation)
• Draft and edit letters/emails for class solicitations
• Keep committee on target for reaching class goals
• Serve as liaison between committee and SMITH staff
• Assume responsibilities of Class Giving Committee members as outlined below
• Personal gift commitment

CLASS GIVING COMMITTEE
• Make a personal leadership gift commitment
• Participate in peer screening for key donor gifts
• Solicit classmates for class gift, including leadership level gifts
• Participate in telephone and 1:1 email follow-up
• Lend name to general effort
• Promote attendance at launch events and cheque presentation reception
• Update Class Giving Coordinator(s) on the progress of peer outreach

CLASS LISTS
• Class lists will be provided containing all classmate names/contact information.
• You will be asked to identify classmates, whom you feel comfortable contacting and soliciting for the class gift. Once committee members have identified their contacts, the RM will make sure there is no overlap and confirm assignments.
The Art of the Ask

For a successful class giving campaign, the RM, and the Class Giving committee need to work together to encourage class participation. The following provides some best practices for successful solicitation. Don’t hesitate to contact the RM or other Smith development staff for more tips and advice.

BEFORE THE SOLICITATION

- Prioritize prospective donors.
- Know your classmates.
- Work with Smith staff to develop an effective Ask Strategy, and to gather necessary research regarding the donor and class giving at Smith.
- Plan to visit your prospective donor in person (when applicable).
- Practice with pre-call role-play.
- Be confident about the ask amount.

DURING THE SOLICITATION

The L-A-I Principle

- Linkage: Personal Connections make it possible to arrange an appointment to discuss the potential gift.
- Ability: Research and personal knowledge help determine if a particular prospective donor has the financial capability or capacity to make a gift.
- Interest: Established interest in the cause/case increases potential giving.

Keys to Remember

- Establish rapport - build on past connections.
- Involve the prospective donor and listen.
- Be enthusiastic and passionate.
- Ask for a specific amount - keep your sights high.
- Ask your classmates to join you in giving.
- Talk about the commitment of others (be aware of confidences).
- Introduce multi-year pledge & other giving options.
- Be clear on next steps.

Possible Responses

- Prospective donor says “Yes”
  ✓ Say “thank you!”
  ✓ Follow through
- Prospective donor offers a gift that is smaller than requested
  ✓ Graciously accept and say “thank you.” Continue to build the relationship.
  ✓ Ask if they would be willing to make another ‘stretch’ gift over the campaign, next year etc.
  ✓ Ask if they would be willing to pledge to give a gift annually every year for five years.
- Prospective donor asks for more time to consider the request
✓ Arrange for definitive time to speak/meet again, ask if there is more information you can provide.

• Prospective donor says “No”
  ✓ Probe for reason, is there a project that is a better fit?

• Prospective donor is quiet and pondering your request
  ✓ Give them time to think it through, let them speak first.
  ✓ Take a drink of water while you are waiting, don’t jump to the conclusion that they are reacting negatively.

• Prospective donor imposes a time limit on the meeting or seems rushed/distracted
  ✓ Condense your presentation and continue.
  ✓ Ask if it would be best to reschedule for a more convenient time.

Handling Objections

• Prospective donor feels that other charities are higher on the priority list, or doesn’t seem interested in your case for support.
  ✓ Thank them for their feedback and ask if there is a specific area they are interested in – let them know their support of any Smith initiative will count towards their class campaign.
  ✓ Connect them with Smith RM for specific projects, or for them to follow up.

• Prospective donor states they are unhappy with recent developments at Queen’s
  ✓ Listen carefully to each issue by asking them to elaborate on their thoughts and thank them for the feedback. Promise to relay their comments. Ask if the issues were resolved if they would re-consider.

• Participation matters
  ✓ Participation is an additional measure of success.
  ✓ Let classmate know you want your class fund to be a true class fund – making a different together, all support is important whether they are able to support with a gift of $100 or $1000.
  ✓ This is a special time for your class and you want to make an impact.

After the Solicitation

• Update the RM with progress and results.
• No matter what the response, please consider sending a personal Thank You note or email.
• Keep discussions confidential. Making a charitable gift is a personal decision and may involve the discussion of a classmate’s financial situation. It is essential that we treat sensitive information with respect.
Stewardship

Thank you! Two simple words that go a long way. At Smith thanking our donors is the most important part. We work closely with our volunteers to make sure our donors know that we highly appreciate everything they do for our school. A personal thank you from a volunteer goes a long way.

There are many options for donors and classes to be recognized.

Appreciation Societies

In order to recognize the contributions Queen's University receives from its supporters, the University has created both annual and lifetime Appreciation Societies. Donors are welcomed into Appreciation Societies based on their total annual gifts received during the fiscal year (beginning May 1, ending April 30)

- **Grant Hall Society**: Recognizes supporters whose gifts during a single fiscal year total $1,000 or more. A first time contribution at each level is recognized with a distinctive Society pin.
  - Limestone Level - Gifts during a single fiscal year total between $1,000 and $4,999
  - Sapphire Level - Gifts during a single fiscal year total between $5,000 and $9,999
  - Diamond Level - Gifts during a single fiscal year total $10,000 or more.
- **Summerhill Society** - Gifts during a single fiscal year total between $500 and $999.
- **Royal Charter Society** - Gifts during a single fiscal year total between $250 and $499.
- **Cha Gheill Society** - Recognizes current students and graduates whose first Queen's degree was earned within the past five years, and whose gifts during a single fiscal year total between $100 and $249.

**SMITH Benefactor Wall**

Recognizes with gratitude supporters who have pledged or contributed more than $100,000 cumulatively to Smith and is located in the BMO Atrium of Goodes Hall (recognition occurs at the time of pledge and is updated annually).

**Queen’s University Benefactor Wall**

Recognizes with gratitude supporters whose cumulative lifetime giving totals $100,000 or more to Queen’s University and is located in Joseph S. Stauffer Library (*recognition occurs at the time of pledge and is updated annually*).
Why Alumni Choose to Give to Smith School of Business

- A positive experience (friends, faculty, staff, education, extra-curricular involvement, etc.) during their time at Smith.
- Received a scholarship, bursary or financial aid and want to ensure others have assistance
- Support our mission.
- Desire to ensure the prestige of the school is maintained in an increasingly competitive environment.
- A degree from Smith is highly sought after.

Ways to Give

Queen’s offers a number of ways to give, to make the giving process as easy and accommodating as possible.

**Online**: The easiest and greenest way to give is to use our online giving tools at www.givetoqueens.ca/smith. The RM will work with you to design a custom class giving page – thermometer, goals, and photos can all be customized.

This secure site provides alumni with the opportunity to:
- Give using a credit card (Visa, MasterCard, and American Express)
- Make multi-year pledges or a pledge payment

**By Mail**: Please make cheques payable to Queen’s University - School of Business, with the designation noted in the reference line. Cheques can be sent to Smith School of Business:

Smith School of Business  
**Goodes Hall**  
143 Union St  
Kingston, ON, Canada  
K7L 3N6

**By Phone**: Call 1-800-267-7837 to make a donation over the phone, using your credit card. Please specify that you are designating your gift to Smith School of Business and your class fund.

Contact

Please don’t hesitate to contact us at any point with questions or concerns. We are here to help make your class giving campaign as well-organized and successful as possible.

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