

Bates



Class Agent Volunteer Guide

Thank You for Volunteering as a Class Agent!

Thank you so much for your work on behalf of Bates as a Class Agent. Over the last two years, we have had a record number of alumni participate as Class Agents for Bates. This extraordinary volunteer effort has helped Bates achieve record-breaking alumni participation and contributions to the Bates Fund. We are so grateful for your commitment to your alma mater.

We hope this guide is a helpful resource throughout the year. Please contact us with questions.

The Bates Fund Team

batesfund@bates.edu

207-755-5976



Fundraising for Bates

Class Agent Responsibilities:

Lead by example: Make your gift to Bates by December 31.

Contact 10–20 classmates about making their Bates Fund gift.

Share news from campus and speak with classmates about the importance of giving to Bates.

Encourage classmates to return to campus for Back to Bates (October 7–9) or attend Bates events in their area!

Thank those who made a gift with a personal thank-you.

Giving Matters

- Giving to Bates every year is a critical measure of Bobcat pride. Each gift shows that you value your own Bates experience and believe in the power of higher education for generations to come.
- Bates depends on alumni philanthropy to help provide financial aid, faculty development, career planning support, and student life programming.
- Our rate of alumni participation is one factor considered by key college rankings across the country. While no ranking system can fully represent the experience of any college, they are an indicator of a college's status and value.
- More than 75 percent of the Bates Fund total each year comes from members of the Mount David Society — a leadership giving society that recognizes donors who put the college first in their annual philanthropy with gifts of \$1,855 or more. Alumni from the most recent 15 classes can join at reduced rates. To learn more about Mount David Society membership and opportunities, please visit bates.edu/giving/mount-david-society.

The Ask

1. Prepare

Make your own gift to the Bates Fund. You'll feel more comfortable asking your classmates to join you in supporting Bates when you have already made the commitment yourself. Please make your gift or pledge as early as possible this year.

Use the Online Tool. Find up-to-date contact information and review your assignments' giving histories. The college will provide a suggested gift amount for alumni based on their previous giving history.

Stay informed. The more you know about what's happening on campus, the easier the conversation will be. The Bates News site (bates.edu/news) is constantly updated with current stories about students, faculty, and college initiatives.

2. Make the contact

Identify yourself. Make it clear that you are a fellow classmate working as a volunteer.

Find common ground. What did your classmates cherish most about their Bates experience?

Emphasize participation. Let them know that their gift, whatever the size, truly matters to Bates.

Verify contact information. Confirm mailing addresses, telephone numbers, and email addresses. Please share changes in the Online Tool or with your staff liaison.

3. Follow up

Use the Online Tool to see when your assignments have made a gift to Bates.

Don't forget to personally thank those who make a gift.

Ways to Give

Online at bates.edu/give

Phone at 888-522-8371

Check made payable to "The Bates Fund." Mail to: Bates College, 2 Andrews Road, Lewiston, ME 04240

Visit bates.edu/giving for more information about giving to Bates.

Bates Beacons — Perpetual Giving Program

Maximize your gift to Bates by dividing your contribution into manageable and automatic monthly payments.

bates.edu/giving/bates-beacons

Mount David Society Giving

The Mount David Society recognizes Bates Fund donors who put the college first in their annual philanthropy.

Learn more:

bates.edu/mds • mtdavidssociety@bates.edu

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| President's Associates | \$10,000+ |
| Named Scholars Program | \$5,000 |
| Founder's Associates | \$1,855 to \$9,999 |
| Young Alumni: 2003–2007 | \$1,000 |

Fiscal Year 2017 Timeline

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|------------------|--|
| September | <ul style="list-style-type: none">- Set class goals- Lead Agents recruit new Class Agents- Bates Fund class solicitation letter (from Lead Agent) |
| October | <ul style="list-style-type: none">- Student Calling begins- Back to Bates: Homecoming & Family Weekend (October 7–9)- Class Agents select FY17 assignments |
| November | <ul style="list-style-type: none">- Report of Giving mailed to all FY16 donors- 2017 Bates Calendar mailed- Volunteer conference call: TBD |
| December | <ul style="list-style-type: none">- Bates Fund solicitation letter from the college- Pledge reminders sent from the college- Volunteer outreach to year-end donors (1st contact period)- End of Tax Year: make your Bates Fund gift! |
| March | <ul style="list-style-type: none">- Volunteer outreach to classmates (2nd contact period) |
| May | <ul style="list-style-type: none">- Bates Fund class solicitation letter (from Lead Agent)- Student Calling ends |
| June | <ul style="list-style-type: none">- Final volunteer outreach to classmates (3rd contact period)- Bates Fund solicitation letter from the college- Reunion Weekend: June 9–11- Fiscal Year ends: June 30 |
| July | <ul style="list-style-type: none">- Thank classmate donors and volunteers |

■ Class Agent Action Items

Using the Online Tool

Logging In

- Visit www.bates.edu/g (Bates Garnet Gateway)
- Sign in using your user ID and PIN (if you are a first time online tool user, this information will be sent to you by your Bates Staff Liaison). If you have used the Online Tool before, but don't recall your PIN, click "Forgot my PIN" on the log in screen, or call the Bates College Help Desk at 207-786-8222 during business hours, M-F, 8–4:30.
- Once logged in, you will see a screen with multiple tabs across the top. Choose the "Volunteer" tab. Click "Fundraising Volunteer."
- You will be asked to read and "sign" a confidentiality agreement. This is an annual requirement for all volunteers. Read the agreement thoroughly, enter your PIN, and choose "Accept."

Tabs and Columns

- **Tab:** The Call List tab displays all of your assignments, regardless of whether or not you've already contacted them and whether or not they have made a gift.
- **Columns:** There are six columns. Please review these columns and become familiar with the information.
 1. **Status:** This column displays what kind of contact (if any) you have had with your classmates.
 2. **Name:** This is your classmate's name. When you ready to contact this classmate, click their name to display their profile page.
 3. **Contact Info:** This column includes phone number and email address information. If Bates has an email on file, the email address will display here. If Bates does not have an email on file, "request email" is displayed. Please ask the classmate to update this information with you.
 4. **Bates Fund:** This column displays the different Bates Fund "programs" in which a classmate falls depending on ask amount, class year or alumni/parent affiliation. Please review the explanations below.
 - **Bates Fund:** Includes alumni with an ask amount of \$1,854 and less.
 - **Mount David Society Prospect:** Includes alumni or parents with an ask amount of \$1,855 and above who did not give at the MDS level last year.
 - **Mount David Society:** Includes any alumni or parent with ask amount of \$1,855 and above who gave at the MDS level last year.
 - **Class of XXXX:** Includes any Reunion 2017 class (all classes ending in a 2 or a 7)
 - **Parents Fund:** Includes any parent with an ask amount of \$1,854 and less.
 5. **Ask:** The amount listed is the "ask amount."
 6. **Class:** Displays the class year.
- **Profile Page:** By clicking in the "Name" column, you will be brought to a classmate's profile page that shows additional contact information, contact notes, and allows you to create a new contact record. Reviewing this information (number of children, last gift amount etc.) will prepare you for the contact.

Steps to Complete a Contact

1. Click the name of the classmate you wish to contact.
2. Review the personal information to prepare for the call.
3. If any contact information is listed as "not on file," remind the classmates to update this information.
4. Once the call is complete, enter the Contact Type, Contact Result, Pledge Amount (if pledge was confirmed) and contact notes.
5. Review all the information you have entered. In the contact notes (required field), enter any updates you received (new home, recently retired, new email address, new job, etc.) If any Bates staff member follow-up is required, please note that here, and click "Flag for Bates staff follow-up." Click Submit.
6. This will bring you to an email form populated with sample text. Please personalize the email, or send an email from your personal email account instead (click "skip email").