



# Class Agent | 2016-2017 Volunteer Handbook



Welcome!

**Thank you** for investing your valuable time and resources in PC by serving as a Class Agent. Your participation will not only encourage others to follow your leadership example, but inspire your peers to reconnect with the College. As you may know, PC is currently in the final phase of the *Our Moment: The Next Century for Providence College* campaign. In the Centennial, this year presents a unique opportunity to strengthen the participation of PC alumni and make a last impact during the last year of our Campaign.

This guide offers an overview of PC's fundraising efforts and is meant to serve as an introductory resource to be coupled with the personal support offered by your Annual Giving Liaison.

Most important, this experience presents many opportunities to connect with peers, the College today, and the mission we uphold. I look forward to partnering with you in the months ahead.

Thank you for volunteering. Together we are one community, one family, one PC.

Sincerely,

Megan (Condron) Smith '91  
Annual Fund Chair, Providence College

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## **Class Agent Description & Objectives**

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### **CLASS AGENT PROGRAM:**

The Class Agent Program is designed to build excitement, encourage participation, and create awareness about the need for philanthropic support for Providence College. The goal is to create positive and successful energy around giving back to PC in non-reunion years with a focus on raising support for the Annual Fund (PC Fund, Angel Fund, and Friars Forever Fund)

### **CLASS AGENT PURPOSE:**

The purpose of the class agent program is to increase the number of undergraduate alumni making gifts to PC in non-reunion years. Class agent work will focus on cross-class solicitation to renew unassigned Lybunt prospects.

### **DEFINING THE CLASS AGENT TERM:**

- Class Agent work will operate on a July 1 – June 30 calendar, coinciding with the College's fiscal year
- The Class Agent term will run for four years leading up to the next reunion cycle with the understanding that they will serve as a member of the reunion gift committee. At this juncture, the Class Agent term can be renewed or the current class agent would be asked to help identify a replacement
- If a class agent is unable to fulfill assigned duties, PC reserves the right to reassign the tasks to another volunteer

### **CLASS AGENT RESPONSIBILITIES:**

- Lead by example and make a gift to the Annual Fund
- Educate fellow alumni on the importance of supporting PC, students, and faculty through Annual Fund gifts.
- Personally solicit 40-50 alumni to encourage participation
- Encourage alumni to attend regional events
- Collaborate with PC staff to determine solicitation strategies, track progress, and secure Annual Fund gifts.
- Participate in conference calls
- When a Class Agent is in reunion they will serve on the reunion gift committee and assist in identifying, recruiting, onboarding and training classmates for the class gift initiative.
- Assist with updating alumni bio information to maintain accurate records
- Steward gifts with personal outreach

### **SUPPORT:**

- PC staff provides training, reference materials, and information to assist with outreach to alumni prospects.

## **Class Agent Fundraising Calendar**

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*Fundraising success depends on peer-to-peer outreach – your influence as a volunteer cannot be overstated. Committee solicitations begin in early fall and continue throughout the winter and spring. Class Agents receive regular reports and updates from your Annual Giving Liaison.*

Recurring monthly items (September, 2016 –June, 2017):

- 5 selections & solicitations per Class Agent
- Fundraising & news update from Annual Giving Liaison

Summer 2016

- Recruiting

September 2016

- **1<sup>st</sup> call – September 8<sup>th</sup>, 12pm**
- Handbook & google doc training
- Set goals for FY17
- First Appeal from PC

October 2016

- **2<sup>nd</sup> call – October 6<sup>th</sup>, 3:30pm**
- Handbook & google doc training continued

November 2016

- **3<sup>rd</sup> call – November 14<sup>th</sup>, 4:00pm**
- Second Appeal from PC
- Thanksgiving greeting from PC & agents
- Giving Tuesday, Nov. 29<sup>th</sup>

December 2016

- **4<sup>th</sup> call – TBD**
- Calendar Year end push from Agents
- Calendar Year End appeal from PC & agents
- 48 hour eblast from Annual Giving

January 2017

- **5<sup>th</sup> Call - TBD**
- Recurring
- Stewardship of fall donors

February 2017

- **6<sup>th</sup> Call - TBD**
- Charter Day
- Charter Day/Third Appeal from PC

March 2017

- **7<sup>th</sup> Call - TBD**

April 2017

- **8<sup>th</sup> Call - TBD**
- Gratitude Day

May 2017

- **9<sup>th</sup> Call - TBD**
- Fourth Appeal from PC
- Fiscal year end strategy

June 2017

- **10<sup>th</sup> Call - TBD**
- Final fundraising push from Agents
- Reunion Weekend - June 2-4
- End of Fiscal Year End Post Card/Email
- 48-Hour Fiscal Year End Appeal (email) from PC

July 2017

- **Final committee call - TBD**
- Class Agent survey

## **Giving Opportunities**

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*All gifts from alumni, given toward any fund, count toward overall participation and dollar goals. Note that Class Agents are focusing on the following:*

### **PC Fund**

Gifts to the PC Fund are put to use immediately and directed where they are most urgently needed to help support the mission of the college. The PC Fund helps to build a bridge between tuition revenues and the actual cost of a PC education.

What do gifts to the PC Fund support?

#### Academic Excellence –

- CIV Colloquia Seminars
- Undergraduate Research
- Summer Institute for Faculty
- Student Supported Tutoring

#### Student Life –

- Friar Development Center Operations
- PC's Strategic Plan for Diversity
- 100+ student organizations
- Career Services & Internship Access

### **Angel Fund**

The Angel Fund provides an ongoing source of support, such as financial aid, so that current students of families with unexpected and extraordinary financial challenges can continue their studies at Providence College.

- Examples of Angel Fund impact:
  - Some 165 students have received Angel Fund support in the 2014-2015 year.
  - Since its inception, the Angel Fund has assisted approximately 100 students annually.
  - On average, the Office of Financial Aid receives approximately 375 requests for additional consideration based on a change of circumstance and hardship.
  - The average amount awarded per student from the Angel Fund is \$3,500.

### **Friars Forever Fund**

Contributions to the Friars Forever Athletic Fund are essential for the growth and success of PC's 19 varsity sports programs. The Fund provides critical aid for scholarships, facilities, and academic support for more than 300 student-athletes.

### **St. Dominic Society – Leadership Annual Giving**

The St. Dominic Society recognizes the College's most generous donors — alumni, parents, corporate partners, faculty, staff, and friends — who make an annual leadership level gift.

- St. Dominic Society
  - Senior Gift- \$100+
  - 1-5 years - \$100+
  - 6-10 years - \$500+
  - 11-14 years - \$1,000+
  - 15 years - \$1,917+
  - Benefactors Circle - \$1,917 to \$4,999
  - Veritas Circle - \$5,000 to \$9,999
  - Presidents Circle - \$10,000 to \$24,999
  - Trustees Circle - \$25,000 to \$49,999
  - Founders Circle - \$50,000 to \$99,999
  - Centennial Circle - \$100,000 and above

## **Helpful Tips to Prepare for Solicitation**

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*You can ask others to make a gift with greater conviction once you have made your own gift. It is very effective to say: I hope you will join me in supporting Providence College.*

### **Planning your approach**

- Think about why Providence College is important to you, why you support Providence College, and what you want your peers to know about why you are making a gift. Answer this in regards to why YOU support PC:
  - I believe...
  - I support...
  - Please join me...
- Familiarize yourself with PC Today, PC literature, and the various giving opportunities. Check out PC's website for news, what's happening, and PC Today: [www.providence.edu](http://www.providence.edu).
- Don't underestimate the responsiveness of any peer on your list. Chances are good that your peer feels as strongly about Providence College as you do.
- Be confident. You need not have an answer for every question at this stage, but questions will help you understand an individual's special philanthropic interests. Your Annual Giving Liaison will help answer questions.
- Your relationship and overall comfort level with your assigned alumni will help you decide when you make a solicitation. Your first call can be utilized as an initial outreach to re-connect with your peers. Subsequent outreaches can be used to further build a relationship, setting the stage for the solicitation.
- Be positive and upbeat. Don't apologize. If your peer says he or she already knows all about Providence College, say you will still appreciate a chance to explain why you believe his or her participation is important to the overall class effort.

### **Making the Ask**

### **Start the conversation**

- Reach out to your assigned peers to arrange a time when it is convenient to talk, either in person or by phone. By arranging a time for a conversation, you will be able to make a case for support more easily.
- Be personal. Explain why you are giving to the College this year and why Providence College is particularly important to you. Your willingness to talk about your gift and your decision to volunteer your time to Providence College's fundraising effort will help convince your peer to participate. Take a look back at the "I believe" – "I support" – "Please join me" exercise.
- Be direct. Discuss gifts already raised and the participation rate thus far. This may help raise your peer's sights.

- Be specific. You may want to use language such as: “I pledged \$\_\_\_ to the PC Fund. Would you be willing to join me in pledging a gift of \$\_\_\_?” OR: “Can we count on your help? Would you consider a gift of \$\_\_\_?”
- Listen. Don’t expect an immediate commitment. Your peer may need to think or consult with others.
- Inquire about matching gifts (see page 13). If a peer qualifies for a corporate matching program, they can possibly double their impact. Donors receive credit for both their pledge and the corporate match.
- Pace the conversation thoughtfully and bring it to a close. Agree on next steps. Remember that early decisions encourage others to give. If a donor requests significant time to make a decision, you may ask, “Would you be willing to name an initial figure now?”
- Thank your fellow alumn. Send a thank you note, naming any figure pledged or proposed. This will help to move the process forward.
- Maintain any additional contact. Some solicitations may require more than one conversation.
- Consult your Annual Giving Liaison for support whenever needed.

**After the gift**

- Promptly report outcomes to the Annual Giving Liaison by entering comments directly to the google doc in the ‘outcomes’ column. Be sure to capture gift amounts and terms of payment accurately. If the gift is designated to a specific area, or it involves a match, please report this as well. Pledge forms are provided as an attachment for easy documentation to ensure all information is accurately captured.
- Donors making pledges will receive confirmation of the pledge details from Providence College and periodic pledge reminders. It may be helpful to let your peers know this when you thank them.

**The Thank You**

- Remember to send a personal note of thanks following each completed solicitation.
- See sample thank you letter on pg. 13.
- Providence College will acknowledge all written pledges.
- Leadership donors may receive a letter of thanks from the Providence College leadership as well.

## **Common Giving Refusals & Responses**

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*Below is a list of questions and comments that you may hear when making your solicitations. We have suggested a few talking points to assist you in your calls. Please remember that if you get a question that you are not comfortable answering, you can always offer to get back to your peer or have a staff member follow up with them directly. Your Annual Giving Liaison is always available to answer questions.*

### **General Talking Points**

- (If peer has given to the College) I know that last year you were a generous supporter of PC, and I want to encourage you to do the same for PC again this year. Our participation is critical and we have set an achievable goal for this year. (See “Helpful Tips to Prepare for Solicitation” at the front of this document).
- (If peer has not given to the College) Gifts from alumni like us help ensure that PC can continue providing current students with the same opportunities and resources that defined our experiences at the College. Our participation is critical and we have set an achievable goal for this year. (See “Helpful Tips to Prepare for Solicitation” at the front of this document).

### **Questions or Comments You May Receive**

*“Will my gift really make a difference?”*

- Every contribution, large or small, directly benefits the lives and studies of current students.
- Your gift affirms the message that our class believes and supports the value of a Providence College education and its power to prepare our students to lead lives of service to the nation and the world.

*“What is Annual Giving at Providence College, and why is it so important?”*

- Annual donations are the foundation on which PC continues to strengthen its reputation for academic excellence, enhance diversity, and advance its Catholic and Dominican mission. The Annual Fund is the cornerstone in that foundation, providing a steady stream of unrestricted support that allows the College to expand programs and opportunities for our students while offering increasing financial aid year after year. Contributions go to work immediately to enrich unparalleled student experiences in and out of the classroom.
- Gifts to the PC Annual Fund give PC the flexibility to respond immediately to the existing and emerging needs of undergraduates. Annual gifts have far more impact than an individual may realize.
- Opportunities to support the Annual Fund include:
  - PC Fund
  - Angel Fund
  - Friars Forever Athletic Fund



## **Common Giving Refusals & Responses**

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*“I don’t give over the phone.”*

- No problem. Give online at [www.givetopc.org](http://www.givetopc.org).
- You may also mail a check to Providence College, P.O. Box 834, Providence, RI 02901-9912 (designate fund in the memo line).
- I would be happy to mail or email a pledge form to you if that would be more convenient.
- Questions, concerns, or gifts by phone can be directed to the Office of Institutional Advancement at 401.865.2085 or at [pcfund@providence.edu](mailto:pcfund@providence.edu).

### **Other Frequent Giving Refusals**

*“I am purchasing a home.” “I’m still paying back my student loans.”*

- PC understands that our alumni at every stage in their career and home life have demands on their budget. This is why we ask for your participation, regardless of gift size. Your participation stands as a symbol of how you value your PC education, and the desire for it to continue for today’s Friars, so that they may celebrate a reunion in the future, as we are this year.

*“I already gave this year.”*

- You may have given during the calendar year, but PC’s fiscal year runs from July 1 – June 30, which is why we are contacting you. Please consider making your annual gift again this year.

*“My sister/brother/cousin did not get accepted to PC.”*

- Not having a relative accepted to PC is certainly disappointing, but please know that the Admissions Office thoroughly reads applications and makes offers of admission based on the ability to succeed at PC. Your participation in giving marks the experience you had as a student on campus.

## How to Make a Gift

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### Online –

- [www.givetopc.org](http://www.givetopc.org)
- We accept MasterCard, Visa, and American Express on our secure website

### By mail –

- Send a check, made out to Providence College, or make a gift using your credit card by printing and filling out the pledge form  
Mail to: Providence College, P.O. Box 834, Providence, RI 02901-9912  
(designate fund in the memo line)

### Matching Gifts –

- Visit [www.matchinggifts.com/providence](http://www.matchinggifts.com/providence) to see if your employer offers a matching gift program (or reach out to your HR department)
- Send the completed forms to PC:
  - Mail – Providence College, Office of Gift Processing, Harkins Hall 412, 1 Cunningham Square, Providence, RI 02918-0001
  - Fax – 401.865.2966
  - Email – [giftprocessing@providence.edu](mailto:giftprocessing@providence.edu)

### Phone –

- Call the Office of Annual Giving at 401.865.1296 between 8:30 a.m. and 4:30 p.m. Monday through Friday

### Wire Transfer –

- To wire transfer funds to Providence College, please contact the Office of Gift Processing at 401.865.2845 between 8:30 a.m. to 4:30p.m. Monday through Friday

### Stocks or Securities –

- Gifts of appreciated assets, rather than cash, often can be made to PC and may provide special tax advantages to you and your family. Giving appreciated stocks, bonds, or mutual funds can allow for the avoidance of capital gains taxes, and in most cases, a charitable deduction for the full fair market value of the donation
- To learn more about these types of gifts, please contact the Office of Gift Processing at 401.865.2845 between 8:30 a.m. to 4:30 p.m. Monday through Friday

### Planned Gifts –

- Many donors help to secure the future strength and position of Providence College by including PC in their wills. The Harkins Society recognizes benefactors who have named Providence College in their estate plans through bequests or other types of deferred gifts. Planned gifts can be made in several ways, including specifying a dollar amount or asset, such as securities; leaving all or a percentage of one's estate; or leaving a residual interest. Planned gifts can be designated for restricted purposes — such as an endowed scholarship — or left completely unrestricted.
- Please contact the Office of Planned Giving at 401.865.2451 to discuss your planned gift.