Thank you so much for volunteering for the Class Ambassador Program. You are part of a unique volunteer initiative to build a culture of engagement and philanthropy at William & Mary.

Annual support from alumni, parents, and friends of the College provides the financial basis to keep the College moving forward. These gifts provide scholarships for students, support for faculty members, and research opportunities, and enable us to address the College’s most pressing needs.

As a Class Ambassador, you are the face of William & Mary to your classmates and peers. Your advocacy and gifts, when combined with the contributions of others, have a huge impact on the College. Not only do your efforts inspire your peers to engage with the College – philanthropically and otherwise – they also foster a sense of class spirit and community.

In order to have a unified volunteer outreach program regardless of class year, the Class Ambassador Program has been integrated with our reunion gift effort. Rather than serving on a separate reunion committee as in years past, volunteers in a reunion year will be called Reunion Class Ambassadors and follow the same outreach cycle as the Class Ambassador Program, with one major difference. In a reunion year, the first outreach period will be in September and October just before Homecoming to capitalize on the momentum of the upcoming reunion, rather than in December as is the case in non-reunion years. By aligning our reunion gift program with the Class Ambassador model, volunteers will enjoy a more flexible and consistent experience.

Our goal in FY 2016, which spans from July 1, 2015 to June 30, 2016, is to reach 100% volunteer participation and 30% undergraduate alumni participation.

We are so thankful to have you on our team! With your help, we know we will meet and exceed our goals.

Go Tribe!

Volunteer Engagement Team
Office of University Advancement
CLASS AMBASSADOR CHECKLIST:

Make a gift
or pledge payment to any area of the College.

Contact 10 Classmates
of your choosing, asking them to consider giving to an area of the College that is meaningful to them. (We will provide you with the necessary information via a secure file sharing system called “Box”.)

Participate in our 3 annual outreach periods
During these time frames, we will ask you to use phone, email, social media, and/or mail to reach out to your classmates:
  o Calendar year-end (December)
  o One Tribe One Day (April)
  o Fiscal year-end (June)
  o Pre-Reunion (Sept/Oct) – Reunion Class Years Only

Thank your friends and classmates
for supporting the College. Let them know that they have made an impact; every gift is needed and appreciated.
YOUR ROLE IN WILLIAM & MARY’S SUCCESS:

Class Ambassadors play an essential role in the College’s overall success by raising awareness about the importance of giving back. Through your leadership, enthusiasm, outreach, and stewardship, you help increase philanthropic participation amongst undergraduate alumni and help your peers stay connected with the William & Mary community.

Lead by example.

Make your own gift or pledge payment first. Your classmates are more likely to join you in giving back if you can share why you choose to support your alma mater.

Share the giving story.

Contact your peers through phone calls, email, social media, or mail to share the impact that alumni participation has on the College’s ability to provide a world-class liberal arts education. Ask them to join you in making a gift to an area of the College that is meaningful to them, emphasizing the importance of annual giving.

Thank those who contribute.

A personal thank you goes a long way. You can use email or personal stationary to thank classmates. If you prefer, your staff liaison can provide you with William & Mary notecards.

MAKE YOUR MARK!

President Reveley has set the participation bar high – we aim to achieve 40% undergraduate alumni participation by 2020. We must make great strides to reach this goal. Our goal for Fiscal Year 2016 is 30% undergraduate alumni participation. Your efforts can make this happen!
MAKING THE ASK

Use this guide to help you make a strong case for William & Mary!

Introduction
Introduce (or reintroduce) yourself and identify that you are a William & Mary Class Ambassador.

State Your Purpose
• Catch up – ask about career, family, etc. Bring the conversation back to his/her days at the College.
  ▪ We will provide your classmates’ giving history and other key information to help you engage in this conversation.
• State that you’re reaching out to ask them to consider supporting the College this year.
• Highlight our Fiscal Year 2016 goal of 30% undergraduate alumni participation.
• Emphasize that giving back is important, no matter what the size of the gift.
• Ask your classmate to make a gift or pledge payment online. Your staff liaison will provide the website link to which you should direct your classmate.

Respond
• If yes, thank them for their support.
• If unsure, use the information in this handbook to make a case.
• If no, thank them for their time and ask to stay in touch.
MAKING THE ASK (CON’T)

Close

• Thank them for their time and consideration, regardless of the response.

• Remind them of other ways to engage with the College – invite them to a local event, or back to campus for events such as Charter Day and Homecoming!

Report

• Stay in touch with your staff liaison to let us know how things are going. We are here to help you throughout this process!

[Sample Email Text]

Dear (first name),

Greetings from a fellow member of the Tribe! I cannot believe how long it has been since we were students at William & Mary. A lot has changed but it is still fun to reminisce about our time on campus and talk about how our experiences there helped make us who we are today.

As you may know, I am serving as a Class Ambassador for our class and I am reaching out to many of our classmates to help reconnect them with the College as well as ask them for their support. I am honored to personally support William & Mary and to have the opportunity to represent the class of (your graduation year) as a Class Ambassador.

I would love to catch up with you and speak with you about supporting William & Mary. If I don’t hear from you, I’ll follow up with a phone call in the next few days so we can connect soon.

Thanks, and I look forward to hearing from you!

Best,

(your name)
HELPFUL TIPS

• Emphasize participation – this is where volunteers can have a HUGE impact. An annual gift is a vote for William & Mary!

• Tell your personal reason for giving. Your story might inspire a classmate to make a gift.

• Customize your communication by sharing a memory that reconnects your classmates to the College.

• Create an email and social media schedule to keep yourself on track.

• Send a personalized thank you note to classmates. We want alumni to know that their gifts are needed and appreciated.

• Be yourself and have fun! Use our suggestions, but ultimately, use your own style.
WHY GIVE?

1. **To make a big difference – even through small gifts.**
   Last fiscal year, gifts less than $250 totaled over $2.1 million.

2. **To help current and future students have the same opportunities you had, and more.**
   In 1980, 40% of the College’s budget was provided by the state. Now, the Commonwealth of Virginia only covers about 12% of our annual budget. Philanthropy can help to make up this difference.

3. **To increase the value of your degree.**
   Undergraduate alumni participation is used as a proxy for alumni satisfaction in important rankings (e.g. U.S. News & World Report) and decisions for corporate and foundation gifts. Giving annually to the College – at any level – increases the value of your degree.

4. **To support something you’re passionate about.**
   Honor an area of the College that has made a difference in your life.
WHAT COUNTS?

Cash gifts or pledge payments of any amount to any area of the College count towards our participation goal. We ask that volunteers emphasize unrestricted giving opportunities so that funds can be directed to the College’s most pressing needs. Our 12 unrestricted impact funds are:

- The Fund for William & Mary
- Arts & Sciences Annual Fund
- Alumni Leadership Fund
- Law School Annual Fund
- Mason School of Business Annual Fund
- Muscarelle Museum Foundation Impact Fund
- Parents Fund for William and Mary
- Scholarships Impact Fund
- School of Education Fund for Excellence
- Swem Make a Difference Fund
- Tribe Club
- VIMS Impact Fund

If your classmate is not interested in contributing to one of the above impact funds, please encourage gifts to an area of the College that might be meaningful to him/her:

- Academic Department
- Student and Service Organizations
- Varsity or Club Sports Teams
- Other Programs
GETTING STARTED WITH BOX

Receiving an Invite

As the recipient of an invite, you will receive an email with an invitation from your staff liaison to collaborate on a W&M Box folder. You should click on the link to Accept Invite. This will route you to a page that allows you to create a free Box account. The free account will provide you with 10 GB of secure storage (which excludes the folder shared with you).

To create your free Box account:

1. Enter your name.
2. Create a password.
3. Click on Continue and you will receive confirmation that the account has been created.
4. Box will then give you a quick tour of the software.
5. The folder from the invite will display under All Files.

Next time you wish to access this folder or file, go to www.box.com and log in using the same email address and password you created.
THE TRACKING REPORT EXPLAINED

STAGE: This is the category that your assignment falls into for their stage of giving.

  Acquisition means that they have not made a gift in the past 5 fiscal years.

  Renewal means that they have made at least one gift within the last 5 years but not yet in this fiscal year.

  Fulfillment means that they have outstanding pledge payments due this year.

  Stewardship means that they have already made a gift this year. Please note that somebody in the fulfillment stage might have made a partial pledge payment this year but still owes more on the pledge in this fiscal year. If the donor has made all pledge payments due this year, their stage would be stewardship.

SUGGESTED ASK: This is the amount that we would like you to ask for from your assignment. The amount is based on their giving history. People in the stewardship stage have 0 in this column because they have already made a gift this year and we don’t need to ask for another one. You can simply contact them and thank them for their support.

GIFTS THIS YEAR: This column will provide you with any gifts made this fiscal year.

PLEDGE PAYMENT MADE THIS YEAR: In this column we provide you with any pledge payments that have been made this fiscal year (June 30-July 1).

LAST GIFT DATE: This provides the last date on which your assignment made a gift including the specific area they gave to.

CONSECUTIVE YEARS GIVEN: This column provides the consecutive years your assignment has given. You can use this in your outreach to let them know that if they continue to give annually they can become a member of the Bell Society.

  • The Bell Society Recognizes individuals who make gifts to the College in consecutive fiscal years. Consistent loyal support for William & Mary provides the College’s students and faculty the tools they need to thrive. There are four levels of Bell Society Membership, depending on years of consecutive giving:
- **Cornerstone** – Two to four years of consecutive giving
- **Cobblestone** – Five to 14 years of consecutive giving
- **Milestone** – 15 to 24 years of consecutive giving
- **Bell-Ringing** – 25 or more years of consecutive giving.

**GIVING LAST YEAR, 2 YEAR, AND 3 YEAR:** In these three columns we have provided the giving history for your assignments over the past three years.

**HOME/BUSINESS/CELL PHONE AND E-MAIL:** We have given you all of the contact information that we have for your assignments. If they have “pref:” before any of their e-mail addresses or phone numbers, this indicates their preferred method of contact.

**NOTES:** This is where you can write the results of your phone call or e-mail conversation. It can be very simple, for example: “Spoke on phone evening of 12/10. She said she will go online and make a gift of $250 to the Fund for W&M.” Additionally, you can include corrections to classmate contact information in this field- thank you in advance for helping us keep our data up to date!