

CHAPTER 9

ON THE ROAD

LEADERSHIP GIFT SOLICITATION

Bates College Surveys Alumni in Person

I have secured 100 percent participation from the board, council and also from the senior management team, as well as from the advancement office staff, by asking them all in open fora to join me in supporting this program. If you don't lead from the front, you cannot expect others to follow!

Alan Watkinson

Director of Advancement

Trinity College, University of Melbourne

Every institution defines annual giving in slightly different terms and “leadership annual giving” is very much the same. More colleges, universities and schools these days are asking their annual giving staffs to “get out of the office and visit with prospects,” but once past that phrase, the goals, metrics, motivations and strategies can vary widely from one institution to another.

If you think of your annual giving program as trying to identify your *supporters*, then think of a leadership annual giving program as identifying who might really be interested in *philanthropy* on behalf of your institution. While personal solicitation has been a cornerstone of fundraising for a long time, it’s still a relatively new innovation (and challenge) for today’s annual giving staff.

Ten or fifteen years ago, you didn’t hear much about leadership annual giving. Now it’s become an important annual giving strategy. Donors are making larger annual fund gifts every year. At the same time, the number of donors to education in the United States tends to be flat or even decreasing.

Many fundraising managers say that there are all kinds of hidden, larger gifts in our prospects if we could just understand sooner who are the taller trees in the forest. Therefore, we need to get out of the office and find those tall trees. It’s increasingly the annual giving office that plays a role in the first steps in moving a small donor to becoming a larger donor.

Many institutions have been raising more dollars from fewer donors for the past several years. The traditional broad base of support is moving to a smaller group of bigger donors. The old 80-20 rule of fundraising—80 percent of the gift income tends to come from 20 percent of the donor population—has been evolving into a 90-10 rule. And while the annual giving program continues its work growing the horizontal base of the donor pyramid, it’s got a hand in the vertical growth as well.

Your Donors Dress in Different Ways

The Gap Corporation owns a number of clothing stores in the United States, including Banana Republic, Old Navy, and The Gap stores themselves. The Gap could have simply named all of its stores The Gap, but its marketing managers understood they had a range of shoppers and different types of customers. So they put a lot of time and money into developing brand name identities for their different stores. The Old Navy crowd is value priced. At the other end of the spectrum, Banana Republic is a starched-linen fashionable crowd that wants to make more of a statement about its wardrobe. Somewhere in the middle of the two is the namesake Gap store itself.

Similarly, in annual giving we have different audiences to engage. With young alumni we are usually talking about making a first gift and the importance of giving participation. They’re sort of like our Old Navy crowd, right? At the Banana Republic end of this scale is the leadership giving crowd. We’re really dealing with a different set of messages, a different set of desired outcomes and goals and a distinct audience. They are a brand for

you—your Banana Republic crowd. Whether it's the materials that you are developing or the agenda that you want to discuss with them, or the follow-up contact you have, they deserve particular communications that create the sense that they are part of a distinct audience within your annual giving program.

Why Is Personal Solicitation Useful?

People are more inclined to give and give more, when asked in person. If you ask somebody face to face to consider a gift, they're more likely to say yes. If you have good phonathon callers, you see a version of this all the time. Personal solicitation is more effective than e-mails and phonathons, and all the other annual giving tools in our toolbox.



A proposal for leadership. Muhlenberg College staff bring a personally prepared proposal for membership in the Muhlenberg Society to their visits with prospects. The proposal fits into a folder and demonstrates to the prospect that this visit is about a leadership annual gift—they're being extended an invitation.

A personal relationship makes a difference. Many major gift programs emphasize getting to a face-to-face conversation with a prospect and deferring any discussion about a gift. They believe if they can establish a relationship, it will positively change the nature of that prospect's relationship with the institution—and that's one of the most important parts of the job.

People like to feel part of a community. Getting into a conversation with people allows you to create a context for them beyond mailings or phone calls. A personal contact creates a whole different dynamic for how they feel about your institution. Their feelings of being involved with your institution come to life when there's a personal interaction.

People like to feel important. You're going to throw prospects a curveball by approaching them for a visit. Many of them have never been visited before by anybody at your institution. That's going to make them nervous and probably a little afraid, because they'll know that fundraising is involved. But, it's also flattering. They like to be on a list of important people. It's natural for people to feel that way, so we should temper their apprehension with the idea that the institution is interested in their story and who they are.

What Are We Trying to Accomplish?

It's good to get in front of people, but what is the goal of your leadership gift program? Is the purpose to identify and engage new prospects? Is the purpose to take the \$500-donors we already have and move them up to our President Society level? Is it campaign-driven because we have a large number of prospects that we need to meet and qualify for an upcoming capital campaign? Do you want to grow annual gift income? Or is it some mix of all of these, or none of these?

Some institutions define their leadership gift program in terms of **prospect identification and qualification**, with the goal of deliberately seeing people who the institution doesn't know much about. If you're in a pre-capital campaign mode and you have many rated prospects (because you did a big electronic screening) and not enough people to visit them, you know what I'm talking about. Typically the prospects wind up being people who've never been visited and who often have no giving history to the institution. The annual giving leadership gift program becomes an urgently valuable tool in prospect identification and qualification. The staff will talk about the President's Circle and the annual giving program but they're also going to listen carefully and ask some particular questions about the prospect's giving interests—because this is really a pre-conversation to a next conversation about a larger capital campaign gift later on.

Some institutions **emphasize slower relationship-building** in their leadership giving programs. Smaller colleges and others with more finite numbers of prospects, in particular, use visits to learn information about prospects and their personal networks. For a private college with 10,000 or 20,000 alumni and a finite world of prospects, every conversation is a learning opportunity about what that prospect is interested in supporting, volunteering on behalf of, and other unknown information to be uncovered. These

institutions often focus on retention and gift increases among **existing leadership-level annual donors**. In general, some of those prospects tend to not be first conversations.

These visits consider opportunities for future involvement as volunteers, class agents and major donors. It is not just a “get in and ask for a gift and get out” visit typically at these smaller institutions; it’s a shopping list of how they can engage this prospect, including asking for an annual fund gift.

Some smaller institutions, especially those that are very reunion-centered, may have the President’s Club on the conversation agenda. But they’re also listening for who wants to be involved as a board member, who wants to be involved with their reunion, and who wants to be involved as a class agent. So there is a **volunteer recruitment** component that may not be at every institution but it is very important for some.

Another goal may be **staff development**. A lot of institutions encourage staff to get out of the office because they are trying to teach them to be comfortable engaging with prospects and they’re trying to develop future major gift officers. For a long time I have championed that there is great virtue in being a career annual giving professional without aspiring to major gift work. Having said that, one goal of many leadership annual giving programs is to identify staff members who really are good at engaging with prospects. It’s a very valued skill.

Most often I see hybrid programs somewhere in the middle. I see institutions structuring combination portfolios of prospects with a certain number of discovery contacts, renewal contacts with existing members of the President’s Club or prospects who are close to the President’s Club giving level.

Institutions create leadership giving programs for different reasons. If your leadership asks you to get out of the office, they might have varying expectations for what they want you to accomplish. There are a lot of good things that can come from getting out and meeting with prospects. It’s up to your institution to articulate its goals and priorities clearly.

Getting Out the Door and In the Door

Most everything we do in annual giving is about trying to catch the attention of people who weren’t paying attention to us before we showed up. I say this with tough love and a smile on my face that the role of annual giving is not to conclude that this cannot be done. Our job is to use our skill and use our ability to see if we can catch people’s attention and get them thinking about supporting our institution.

Be careful arguing your limitations. Your role is not to conclude that people don’t want to meet with you and people don’t want to hear about joining the President’s Club. It’s up to you to figure out how to become skilled at doing it. You may not prefer doing it as part of your job, but it’s a reasonable goal of the annual giving program and it’s an acceptable goal for an institution to challenge staff and prospects to have these conversations. Why not give it a try? Many fabulous face-to-face fundraisers started by surprising themselves.

I often am asked what level of gift counts as a leadership gift. I call it the “muddle in the middle.” Everybody has an annual giving program that typically includes strategies like a phonathon, direct mail and e-mail. At the other end of the pyramid is major gift activity. Typically you know what the gift range tends to be for those conversations—and usually the sky’s the limit. In between those two is this gray “muddle in the middle.”

There is no single answer to what the gift level should be. At Harvard University a leadership annual gift could be \$100,000 to \$1 million. A small institution just getting into major gift fundraising would be grateful for a gift of \$1,000. In general, the work of the leadership annual giving program typically ranges from \$1,000 up to \$100,000.

I see too many programs working in silos. The annual giving staff is operating on the low end and the major gift staff is operating on the high end, and they’re both content to avoid the area in between, which is not healthy for an institution. There’s a good kind of energy when you’ve got a need for keeping straight whose prospects are whose, because that tells me people are out visiting prospects. If you can use the annual giving program to reach up and fill in some of that “muddle in the middle,” even if that creates a need for greater management of prospects with the major gift officers, that’s okay. One of the benefits of a good leadership annual giving program is that it encourages major gift staff to set their sights on higher gifts.

Personal solicitation is about organizing your time, making productive contacts, managing the agenda with prospects, asking for a gift, advancing the institutional relationship, and improving the institution’s knowledge about prospects.

Organizing your time is a very important piece of this. Leadership giving and personal solicitation don’t always fit easily into a direct marketing calendar. If you’re an annual giving manager already charged with managing the phonathon (or supervising the person who’s managing the phonathon), ensuring that mailings get out, working with deans, launching e-mail appeals, and running reports, it’s easy to rationalize that you don’t have time to get out of the office. Many annual giving professionals are very good statisticians, good phonathon student managers, good writers, and excellent detail people. They take pride in getting things out on the date they were supposed to get them out. But, that doesn’t always mean that they’re great at getting out themselves of the office to meet with people.

In some cases, it can be like oil and water, since the direct marketing functions are largely an “inside job” and leadership annual giving is an “outside job.” There’s fertile ground for annual giving folks to say, “Well, I sure would like to get out of the office, but wouldn’t you know it, I just don’t have the time to get out of the office.”

Here’s a solution from one annual giving director: “I schedule my week with times blocked out and make appointments to visit with people during those times. I don’t schedule anything else during those times and everyone knows it. Yes, we do have fires that pop up but mentally making those time blocks somehow helps to control the fires.” If you make the decision to make this a priority, you can do it.

What's the Right Level of Activity?

When **Skidmore College** was in the public phase of a campaign, annual giving staff there made fifty prospect visits to per year. Skidmore was strongly interested in developing relationships. It is a smaller institution, and a prospect they meet with today may be a reunion volunteer in five years. Yet, they had campaign urgency and lots of rated prospects, and the annual giving staff shouldered some of that workload. Everybody made visits in addition to their usual responsibilities.

Bucknell University's annual giving staff makes seventy-five face-to-face visits per year and seventy-five phone contacts with leadership gift prospects.

Bates College measures how many new volunteers or continuing volunteers it recruits as a result of its prospect visits. This institution finds that the more prospects staff meet with, the more gifts come in for its leadership giving circle—so the number of visits are a bigger goal for staff than actual dollars raised. When staff members meet with prospects, they try to accomplish a number of objectives in addition to a gift, including identifying a prospect's volunteer interests.

Carleton College has visit goals for its annual giving staff and measures how many prospects are subsequently “qualified” and passed on to major gift staff through this process. Some institutions (at least initially) avoid putting their annual giving staff in the position of being accountable for a certain dollar figure in personal solicitations. Because the annual giving staff has more direct control over its own level of activity, staff members are measured not on dollars raised but on number of prospects they qualify. Carleton finds that if annual giving staff is meeting its visit goals, then the gifts and dollars will follow.

At the **University of Virginia** the gift range for the leadership program ranges from \$2,500 and \$100,000. The annual expectation is 125 visits per staff member, which works out to ten to fifteen visits per month. All UVA annual giving staff members have other responsibilities in addition to their personal visit work.

Annual giving staffers at the **University of North Carolina** conduct 150 personal visits a year. They also have a goal of five presented proposals of \$25,000 or more per year; the remaining visits are typically in the range of \$2,000 to \$15,000.

The University of Texas has full-time high-end annual giving officers devoted to personal solicitation. They see donors for gifts ranging from \$1,000 to \$25,000. They visit fifteen to eighteen prospects per month. The program also has an “assessment officer” who focuses solely on donor acquisition and sees twenty to twenty-four people per month. These are prospects that the institution doesn't know a lot about and that person functions as a “specialist” in first-time contacts with these prospects.

Cal Berkeley has a team of annual giving officers “getting out of the office” full time soliciting leadership gifts. Like the University of Texas, Cal's staff focuses on qualifying prospects.

Some others:

Rhodes College—ten visits per month, twenty personal solicitations total;

DeSales—sixteen visits per month, 200 per year;

Durham University in England—eight to twelve visits per month;

American University in Cairo—twenty visits per month;

William Patterson University—fifteen to twenty visits per month;

Linfield College—eight to ten per month;

American University—fifty visits per year.

There are three main hurdles for people heading out of the office: Approaching the prospect, getting an appointment, and asking for a gift. Let's talk about each of them.

Why Would They Want to Meet With Me?

First, there's getting their attention. What will cause people to want to have a meeting with you? Here are some examples.

Bates College selects prospects, in part, on the basis of who is marking a milestone graduation anniversary year. Bates then "uses a reunion survey as an opportunity to approach prospects." Whether or not you have a reunion culture at your institution, I would still invoke an anniversary-year sense of nostalgia: "We know it's your 20th anniversary," puts some structure to why you are calling to meet with that person. Bates staff contact prospects and say, "I'd like to sit down with you and complete your reunion survey because I know you have a reunion coming up."

The simple, two-page questionnaire is designed to help start a conversation about favorite memories from Bates: favorite professors; reunion plans; and the story of what a graduate has been doing in the years since they left Bates College. Once there has been lots of nostalgic conversation and reminiscing, the discussion usually moves easily into a discussion about a leadership annual fund gift.

For a lot of new staff the survey approach can be a very useful crutch for them to lean on while they're getting comfortable with the process.

Bates encourages young alumni to bring their local Bates friends to dinner or drinks. This broadens their relationship web even further. The meeting becomes a less intimidating and more a social experience, and it also brings more people to the table and teaches the college about a prospect's networks.

Tulane University also uses the anniversary year as an excuse to get together. Tulane staff members don't use a survey but they contact prospects and say, "It's your reunion year and Tulane would like to hear your story." Prospects have nostalgic feelings and feel flattered and important. At Tulane it's a very helpful phrase in getting appointments.

It's not required that you use this kind of anniversary survey as an excuse for a personal visit. In fact, visits don't have to revolve around anniversaries at all. If you're going to be in Chicago, take inventory of some of the great things your alumni are doing in the Chicago area. Tell prospects you'd like to hear their story. You want to brief them on the latest news

about campus. You want to ask their opinions. What do they think about your institution's leadership? Why is your institution important to them? Perhaps you want to say thanks for any previous giving. And you want to discuss the leadership giving program. You'll find that most people might be nervous and apprehensive, but remember that they'll also likely be flattered, enthused and curious. It's up to you to take any edge off the agenda.

Remembering that a lot of the prospects that we visit for leadership annual gifts have not been visited by the institution before, the Tulane staff offered some additional tips. One is to say that you were going to be visiting a prospect's area regardless of their visit with you. Don't make your visit seem more important than it really is. You'll make someone who you're trying to meet for the first time unnecessarily nervous about the magnitude of your meeting. Say you're going to be in the area and you're trying to meet with as many folks as you can while you're in town.

Tulane's second tip: Don't frighten them by knowing too much about them. The goal isn't to impress them by knowing way more about them than they ever thought their alma mater could know. While it might seem like a good idea to compliment them on the current market value of their house, you'll only scare them instead.

Also, don't overwhelm them with process, and don't be too regimental with your survey or agenda. Think of the questionnaire as an agenda, not a script. If you say "question 5 ... question 6 ..." and so on, you'll have them looking at their watch in no time.

Carleton College will initiate the visit process by sending an introductory letter from the president or the vice president for development, notifying prospects that an annual giving staff member will be seeking a visit to discuss the college. They want to update you on the latest goings on at the college. They want you to be aware of the good news going on. They'd like to ask your opinions about things.

The introductory letter also explicitly says that this will not be a solicitation. All bets are off after that first visit, but Carleton is the smaller type of institution where the relationship is very important. The college isn't just recruiting new President's Club members, it's also having a first conversation with somebody that the college hopes will engage in a longer-term dialogue. So, it's willing to explicitly say that the first visit isn't a solicitation (but it will follow up with a solicitation promptly after that).

Most institutions tell me that e-mail provides good access these days, especially for younger alumni and physicians. Some institutions successfully use administrative assistants to set up appointments for the annual giving staff, but others have said be careful with this idea. It can seem off-putting to the prospect that you didn't consider it important enough to contact them personally, but it can also add some much-welcomed efficiency to the overall program.

A couple of ideas about staff training: **Bates College** uses campus faculty and staff who are also alumni as practice for a new staff member. They've got their two-page questionnaire, so, while the alumni faculty sometimes get a little weary of all the interviews, it is good training for the new staff. **Haverford College** sends new staff to visit with younger

alumni, and gets them in the habit of having conversations—with people generally less intimidating to them. Many institutions say they never send new staff out alone; they go out with a more seasoned staff buddy until they are acclimated.

Williams College has a thought-out strategy for involving volunteers in staff visits. When no one on the staff has an existing relationship with a prospect, they'll look to volunteers to make an introduction. They don't have a hard and fast rule requiring the use of volunteers but they will try to arrange a visit on the basis of peer relationships. Williams also tries to have a deliberate progression from annual gift donor to major gift donor; so at some point, it will make sense for the annual giving staff member to go visit a prospect and bring along a major gift staff member to help transition the relationship.

Sometimes, annual giving folks gnash their teeth when they "lose" a prospect to the major gift staff, but strategies like Williams make sense over the long run, moving people up the old pyramid.

What to Bring?

I have already made the point that you're dealing with your Banana Republic audience, and so, creating a little cachet for leadership gift program is important. There are some fundraisers who tell me they don't need any materials and don't want any materials—they just want to have a good conversation. It depends on the priorities for your program, but I think materials can be useful in the same way that the surveys and a structured agenda are useful. Here is a summary of points for what I value in leadership annual gifts materials:

- **A look and feel different from other appeals**, something more elegant than your prospects have seen from your institution before—an invitation more than a solicitation. You've trained them, whether you know it or not, to react a certain way to your direct marketing appeals. You're now delivering a different message.

While we all take pride in fundraising as cost-effectively as we can, I don't think leadership gift materials are the time to be cheap in your design. I think there's an important message being reinforced with the texture of the paper and the quality of the materials. This is the grown-up's table.

- **Versatility** is another big word for leadership gift materials. I like to have the ability to tailor contents depending upon exactly who I'm going to see. A pocket in the back or front of the brochure becomes particularly useful tool. Tailor your message with elements such as a list of donors, a personal letter from the CEO or a peer, a personalized pledge letter, a calendar of upcoming events, or a returnable survey.
- Design a package that lets you **hand deliver it or mail it**. You'll have the best of intentions but you'll still get to the end of the year and have people that you're not going to get to visit in person. That doesn't mean they don't want to receive an invitation to be part of your President's Circle. Give yourself a back-up option.

You are invited to the President's Associates and make a gift that is deep in the heart of Texas.

WE'RE TEXAS

The University of Texas at Austin is a commitment to excellence. Regardless of the President's Associates help make student and faculty activities possible in countless ways. Gifts to the Office of the President and the Deans of each college and school provide valuable learning opportunities, making UT an important place to study, teach, and work.

Throughout the year, President's Associates receive special mailings and are guests of the president at select UT events and programs. Invitations extended in a given year might include luncheon, reception, and symposium.

60th Anniversary since 1882

In 1882, the University of Texas at Austin was one of the first public universities in the United States. We have achieved this by embracing the great needs and ideas that have shaped our nation throughout history. We have pursued the highest ambitions of scientific achievement, and by providing the most advanced tools of exploration and the highest expertise.

Our success depends on dedicated faculty and staff, an ambitious student body, and a committed base of alumni and friends.

I invite you to continue to help us transform lives by joining the President's Associates, a group whose members make a meaningful difference in every corner of the 49 Acres.

Larry R. Faulkner
President

By invitation only. A distinctive University of Texas brochure “invites” prospects to membership in the President’s Associates. It’s important that prospects see a very different leadership giving “brand”—one different from the broad phone and mail appeals they’ve seen previously.

Just Ask

Okay, let's talk about asking for the gift itself. In general, most annual giving leadership gift visits involve sharing a case statement (your brochure) and letting the prospect focus on your invitation to join. Open-ended conversations are certainly appropriate for an initial major gift conversation, but good leadership annual gift discussions are generally framed around a specific invitation.

The person you're meeting with understands that you're an advocate for giving to your institution, and they may also be used to visits from other gift officers from other institutions. If you've developed a good rapport during your conversation, it's absolutely appropriate and important to include philanthropy in the discussion. One of the phrases used by **Bates College** staff is the idea that "I wouldn't be doing my job if I didn't talk about the annual fund." (They chuckle about this phrase at Bates when volunteers also get up in front of an audience and say that "I wouldn't be doing my job if I didn't talk to you all about the annual fund," because they know they've successfully trained another volunteer.)

At **Indiana University**, the staff is trained to just be passionate about the importance of annual gift support—to the point of being donors themselves.

I see plenty of leadership annual gift officers who become very comfortable in their work and get aggressive at wanting to go out and meet with people and ask for a gift. At the end of the day I think "just ask" is the important thing. We say it to our phonathon callers, we ought to say it to ourselves. If it's a goal of your institution to be slower with prospects rather than faster, that's okay too. You'll be pleasantly surprised at the enthusiasm that you'll generally receive—not from everybody, but from a lot of people.

If you don't get an immediate gift, remind them their support is important. Ask them to think about it, and remember that their relationship with the institution continues to be valuable. Set the stage for future conversations. Annual giving officers, unfortunately, may come and go, but you are about the only alma mater that your prospects are going to have for the rest of their lives. That continuity and that institutional knowledge is important.

It is very important for you to be the pipeline back to the institution. How did you increase our understanding of those folks? What did the prospect know already? What do they want to know? What's their giving style? How do they like to receive information? What affinity do they have for us? Do you have any opinions about their major gift prospect status? While annual giving people may be new at this, they're not exempt from the regular contact reporting that happens in most major gift operations. They're contributing to the institutional knowledge as much as anybody else.

A Leadership Gift Model in Maine

It's still a little unusual to find an annual giving office outside the United States where the staff is encouraged to "get out of the office" and make personal solicitation visits on behalf of the annual fund. So, in a bit of a compromise, I looked to Maine. There, Bates College is perfecting a leadership annual giving model that deserves some attention.

Kimberly Hokanson, director of alumni and parent programs, came to Bates College from Harvard University where she spent eighteen years. Bates' leadership giving model descends from Harvard University's College Fund.

Dick Boardman headed the Harvard College Fund for many years and developed a reunion survey program. He sent letters to reunion-year alumni asking for their attendance and their permission to be visited from a staff member. Harvard College Fund staff hit the road, met with reunion people and gathered information through surveys about their experiences at Harvard. Staffers discussed the graduates' relationships with Harvard today and people they knew in their graduating class. They also discussed gifts made during their previous reunion and asked them how much they anticipated contributing at the upcoming reunion. This educated the graduates about their impending reunion while teaching them about the Harvard College Fund. It was also an opportunity for staffers to identify future volunteer leaders and donors.

Hokanson modified Boardman's model to fit Bates College. In part through the merger of Bates' alumni relations and annual giving departments, all staff have alumni relations and annual giving responsibilities. Like Harvard, Hokanson's staff members go out and survey graduates. The survey they developed helped those who were uncomfortable visiting graduates feel more comfortable. It gives them a focus and teaches them how to communicate with graduates at the same time. Eventually staffers become comfortable with what they are doing and no longer need the survey as a conversation starter with alumni.

At many institutions, when a staff member leaves there is often a shift in structure. Hokanson is developing an organizational structure that remains strong even when someone leaves the staff, regardless of whether the staff member was an alumni relations or annual giving employee. She advises institutions just starting a leadership giving program or in the process of restructuring to consider a survey program that approaches longtime members of giving societies. They can also reach out to strong prospects to be early members of the society.

As part of their training, staff members are sent out to alumni working in advancement. They are an understanding audience because they've been surveyed before and, at times, make the interview challenging for trainees. They will move on to interview other alumni on campus and in the community. Sometimes trainees are sent to people with whom Hokanson's office has a working relationship to interview them. The survey and ongoing training helped "converted" alumni relations professionals become skilled fundraisers. Some have become major gift officers for Bates.

Gift officers can also use surveys as a tool for gift solicitation. A non-reunion-related survey allows the gift officer to use their meeting for another purpose. The survey can also be used to open a dialogue with a challenging potential donor. As the reunion date draws closer, the gift officer can approach the potential donor with an appeal for a gift to Bates. Hokanson says gift officers commonly tell donors, "I also wouldn't be doing my job for Bates if I didn't remind you that the end of the fiscal year was coming and that we hope

you'll make a gift to the annual fund this year, even though we've spent a lot of time talking about your reunion next year."

Hokanson sets annual goals for the gift officers at Bates. Ideally, each officer meets with about fifty people per year. Officers know a lot about older reunion classes, so Hokanson sets a lower personal visit goals for those classes. Little is known about younger alumni classes, so officers face higher visit expectations from Hokanson.

Hokanson and her staff keep careful track of their surveys. They have a tracking sheet with staffer names on the left, classes on the top and the number of prospects that have been selected to be surveyed. The sheet also tracks appointments, completed visits, and contact reports. Hokanson emphasizes the importance of documenting all visits with a written report. Staff members are recognized in meetings for timely appointments and visits.

Annual giving officers know in advance the gift amount they will request. The information is in the system so that gift officers will not have to guesstimate an amount. Some officers find it easy to ask for gifts, while others are not too fond of the task. It helps to have a script that sounds natural when officers call a person to ask for gifts. Some fundraisers use their own language to fit the situation.

Officers submit their contact reports via e-mail. Information is then entered into the Bates database and a paper copy goes into the prospect's file.

While it's true that not every leadership donor becomes a major donor, every major donor has to start somewhere. It is rare that someone just comes out of the woodwork and establishes an endowment without having ever given smaller gifts. Our largest alumni donor began by giving gifts of just \$50.

Joanne Troutman

Director of the Susquehanna University Fund
Susquehanna University