

Nichols School Class Agent Guide

2006-2007

Part I

Q—What is the Mission?

To keep alumni connected to each other and to Nichols.

Q—What are the Goals?

- \$800,000 Annual Fund Overall Goal
- To increase attendance at alumni and school events
- To identify alumni who can speak at student assemblies and classes
- To have class notes about your classmates in issues of *Toaynoes*
- To improve the alumni database and decrease the number of lost alumni
- To increase participation in the Annual Fund
- To help raise \$500,000 from alumni for the 2006-2007 Annual Fund
- To identify alumni who should be solicited at the leadership (\$1,000+) level

Q—What is the role of a Class Agent?

- Participating in the Annual Fund
- Recruiting, organizing and working with other class agents
- Finding classmates' contact, family, and business information
- Soliciting classmates for the Annual Fund
- Emailing or calling classmates to gather class notes for publications
- Planning reunion events
- Encouraging classmates to attend alumni and school events
- Working with the Alumni Office

Q—What is the annual schedule for a Class Agent?

September – recruit more Class Agents, encourage attendance at Homecoming

October— Annual Fund Kick Off – October 12th to personalize notes to class

November—Year-End solicitation of classmates, encourage event attendance

December— encourage attendance at Annual Meeting and Holiday Luncheon

January— Annual Fund Phonathons – Class Agents call classmates

February— collect class notes for *Toaynoes*

March—solicit classmates who gave last year but not this year (LYBUNTs)

April— collect class notes for *Toaynoes*, call classmates if needed

May—Email class news and updates, remind about upcoming events

June—Thank leadership, attend Reunion, follow up with non-donors

July—Receive report on Class Participation and Totals for Annual Fund.

Part II

How to Make Soliciting Classmates Efficient and Effective

BACKGROUND

Q—What is the purpose of the Annual Fund?

The Annual Fund goes to Nichols' operating expenses. Along with income from the endowment, the Annual Fund enables Nichols to have a balanced budget and salaries which attract and retain a talented and diverse faculty. The Annual Fund contributes to strong financial aid programs, vital programs, books, technology, maintenance, and helps keep our tuition affordable in Western New York.

Q—Doesn't tuition meet all of Nichols' expenses?

Tuition provides only 75% of the income to meet expenses. Put another way, there is a \$3,000 difference between tuition and the actual cost of educating each student.

Q—How big is Nichols' endowment?

The current market value is approximately \$19 million which generates \$800,000 annually for operating expenses.

Q—Why should alumni participate in the Annual Fund?

Supporting Nichols is an opportunity to make a difference in something that has been important in your life.

Q—What is the Headmaster's Society?

The Headmaster's Society is made up of all leadership donors. A leadership donor is one whose gift is \$1,000 or more (and there is a level for * Young Alumni). There are 6 levels of giving within the Headmaster's Society:

John J. Albright Club - \$10,000 or more

Nichols Faculty Club - \$7,500-9,999

1892 Club – \$5,000-7,499

Clock Tower Club – \$2,500-4,999

Quadrangle Club – \$1,000-2,499

*Young alumni within 10 years of graduation - \$500-999

In total this group of donors makes up more that 71% of the Annual Fund goal each year.

Q—How many alumni supported the Nichols Annual Fund last year?

Last year, 1,377 Nichols alumni participated (34%), by contributing more than half a million dollars of the total \$771,000

Q—What is the meaning of some of the jargon?

A lybunt is one who gave Last Year But Unfortunately Not This year.

A sybunt is one who gave Some Years But Unfortunately Not This year.

A leadership donor is one whose gift is \$1,000 or more.

DNS indicates one who has requested that he or she not be solicited by Nichols.

Q—What is the goal for alumni in 2006-2007?

Our goal is to have more than 35% of the alumni contribute to the overall goal. Some of that \$800,000 comes from alumni who are trustees or current parents, and over 71% comes from the Headmaster's Society.

Q—What is more important: participation or total dollars raised?

Both are important but we especially focus on increasing the participation percentage. The message is simple: *Every gift counts.*

Q—How and by whom are the goals established?

The Development Staff along with the Chairman of the Annual Fund (John Farmelo '77) have developed a formula based on prior year performance. Basically, it projects that most classes will increase participation. Reunion classes should show significant increases, while classes that just celebrated reunions will have some decline.

Q—Are there some classmates I should not solicit?

There may be classmates you should not solicit. These include: classmates who are members of the Board of Trustees, members of the Faculty or Staff, those who are current parents at Nichols, and Headmaster's Society prospects (those who contribute at a "leadership" level of \$1,000 or more). They are solicited by others, but their gifts count in your class participation and total dollars.

STRATEGY

1. The goal for each class is to:

- retain all donors from 2005-2006
- recapture all LYBUNTs
- recapture all SYBUNTs
- add 3 to 5 never-givers

2. All classes should reach at least 35% participation.

TACTICS

1. Six Steps to Achieving Your Class Goal

1. Make your own gift before soliciting others
2. Recruit and organize a Class Agent Team
3. Contact all of last year's donors first
4. Contact all of the LYBUNTs
5. Contact all of the SYBUNTs
6. Identify and contact some never-givers

2. Making it Easier

- A team of Class Agents with members assigned specific classmates to contact.
- Use the website and email to send messages to your classmates.
- Encourage classmates both to make online gifts
- Emphasize that *Every Gift Counts*.
- Encourage classmates to give early.

3. Using the *Class Annual Fund Giving Reports* (provided by Alumni Office)

- Lists all donors with the amount, date, and method of payment

4. Using the *Class Directory*

The *Class Directory* provides the latest contact information we have.

5. What's Worked with Other Classes

- Sending personal notes and emails to classmates
- Calling classmates to connect
- Continued personal contact to lybunts, sybunts and selected never-givers
- Class Giving Challenges
- Timely thank yous and acknowledgments for all gifts

6. Keeping Class Directories Fresh

As you learn of data changes, please send them to the Alumni Office. And please collect email addresses for classmates without them. Most importantly, the collection of emails is making the difference.

7. Support from the Alumni Office

We will notify you when gifts arrive so you can cross their names off your list; send you an updated *Class Directory* or *Class Giving Report*; and send all mailings to your classmates.

TIMELINE FOR ANNUAL FUND

1. Identify Class Agent Team	August - September
2. Attend Annual Fund Kickoff	October 12
3. Receive <i>the 05-06 Annual Report</i>	by October
4. Alumni Office mails solicitation letters	by end of October
5. Begin solicitation calls, emails, more notes	by November 1
6. Receive updated <i>Class Giving Report</i>	by December 1
7. Mailing of a year end appeal	December
8. Annual Fund Phonathons	Jan.30, Jan.31, Feb.1
9. Receive updated <i>Class Giving Report</i>	by April
10. Alumni Office mails letters to all pledges	by mid-May
11. Receive final updated <i>Class Giving Report</i>	by June 1
12. Reminders to LYBUNTS and unpaid pledges	in June
13. Deadline for donations - Fiscal year ends	on June 30

For Agents of Reunion Years:

- Encourage classmates to help with Reunion class gift
- Encourage classmates to join Headmaster's Society to honor Reunion
- Achieve a significant increase in both participation and dollars raised

Finally, Any Questions?

If you have any questions or concerns, please call Sarah Gelman Carney '92, Director of the Annual Fund and Alumni Relations, at 716-876-3450 or email scarney@nicholsschool.org.