

# Philanthropy in Action

YOUR GUIDE TO SERVING AS A  
VOLUNTEER FUNDRAISER



**HARVARD**  
College Fund



## DEAR FRIENDS,

Welcome to our special network of Harvard College Fund volunteers! We are proud to join you in this indispensable role. Our collective efforts—from the communities we build, to the peers we contact, to the stories we share—make an impact on the lives of faculty and students every day.

Alumni and parent ambassadors raise critical resources that help open doors to a Harvard education, expand extracurricular and research programs, strengthen the House experience, and so much more. We have an opportunity to accomplish great things together, and we look forward to supporting and celebrating your important work.

Thank you for your time, your energy, and your partnership in shaping the future of Harvard.

The image shows two handwritten signatures in black ink. The signature on the left is 'Geraldine Acuña-Sunshine' and the signature on the right is 'Michael T. Kerr'.

**GERALDINE ACUÑA-SUNSHINE '92 AND  
MICHAEL T. KERR '81, P'19, '12, '08**

CO-CHAIRS, HARVARD COLLEGE FUND



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# SUPPORTING HARVARD'S FUTURE

Harvard inspires the risk taking and exploration that transform the lives of students and faculty. Extraordinary things happen in classrooms and laboratories, on stages and in concert halls, on athletic fields and online. They happen in Harvard's Houses, where living and learning are intertwined like nowhere else. And they happen thanks to Harvard's commitment to expanding access for our extraordinary students, who come from every corner of the world.

## THE HARVARD CAMPAIGN FOR ARTS AND SCIENCES

In October 2013, we launched a comprehensive campaign to ensure that Harvard continues to be a place of discovery for people leading positive change in the world. The Campaign will secure necessary resources to fuel Harvard's aspirations.

Your volunteer fundraising efforts are at the heart of the Campaign's success. Thank you.

*Learn more about the Campaign:* [campaign.harvard.edu/fas](https://campaign.harvard.edu/fas)



## HOW DOES YOUR WORK CONNECT TO THE CAMPAIGN?

Through your own gift commitment and by spreading the word to your network, you invest in Harvard's foundation and in new ideas. You promote innovation. You strengthen the Harvard experience for today's students and for future scholars.

You support these ventures when you partner with the Harvard College Fund. Through your volunteer efforts, you give the leaders of Harvard College, the Graduate School of Arts and Sciences, and the Harvard John A. Paulson School of Engineering and Applied Sciences the agility to test ideas, push boundaries, and respond to opportunities.



# CAMPAIGN PRIORITIES

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## **DEAN'S LEADERSHIP FUND**

The Dean's Leadership Fund provides unrestricted funds that can be used immediately and flexibly, giving Harvard the capacity to continue as a place of discovery.

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## **FACULTY AND OUR SCHOLARLY ENTERPRISE**

Harvard brings together the brightest minds across an unparalleled landscape of disciplines, with unrivaled resources and the freedom to explore fearlessly, think creatively, and act boldly.

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## **FINANCIAL AID**

Bringing the best and brightest young scholars to campus and helping them to thrive, no matter their backgrounds, is the foundation of Harvard's excellence.

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## **HARVARD JOHN A. PAULSON SCHOOL OF ENGINEERING AND APPLIED SCIENCES**

Harvard is rethinking and dramatically expanding the place of engineering in higher education and reimagining the role of engineers in society.

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## **HOUSE RENEWAL AND THE STUDENT EXPERIENCE**

The Houses are among Harvard's most important learning places, where undergraduates, graduate students, and faculty live, work, and learn together.

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## **LEADING IN LEARNING**

Like nowhere else in higher education, Harvard is exploring, innovating, experimenting, and leading change in how faculty teach and students learn.

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# YOUR PARTNERS

When you volunteer for Harvard, you work with Harvard College Fund staff, alumni and parent leaders, and fellow committee members who are here to guide and support your efforts. This network can offer advice, answer questions, and help you achieve your goals. We encourage you to participate in regularly scheduled training opportunities and events throughout the year.

## **HARVARD COLLEGE FUND (HCF)**

Since 1926, our organization has led all giving to Harvard College, the Graduate School of Arts and Sciences, the Harvard John A. Paulson School of Engineering and Applied Sciences, and more. In partnership with a dedicated volunteer network, our staff is here to give you the tools, guidance, and support to ensure the success of your reunion and annual volunteer efforts.

## **HCF EXECUTIVE COMMITTEE**

These volunteer leaders serve as the most visible ambassadors for the Harvard College Fund, working closely with HCF staff, Edgerley Family Dean of the Faculty of Arts and Sciences Michael D. Smith, and class and program committee chairs to advise on strategies and goals.

## **HARVARD ALUMNI ASSOCIATION (HAA)**

A vibrant and deeply engaged community, lifelong academic exploration, and a commitment to service—this is what the Harvard Alumni Association (HAA) is all about. The HAA connects alumni and friends worldwide to each other and to Harvard through a variety of social, professional, and intellectual programming, shared interest groups, clubs, events, and services.





# THE GAME-CHANGING IMPACT OF HARVARD VOLUNTEERS

## ACTIVITY IN 2015–2016

**5,400**

ALUMNI CONTACTED  
BY REUNION  
VOLUNTEERS

**41,000+**

INDIVIDUAL GIFTS  
MADE THROUGH REUNION  
AND ANNUAL CAMPAIGNS

**800**

FAMILIES BROUGHT  
CLOSER TO THE HARVARD  
COMMUNITY BY  
PARENT VOLUNTEERS

**300**

PEERS ENGAGED  
BY GRADUATE SCHOOL  
VOLUNTEERS

# 2016–2017 HARVARD COLLEGE FUND EXECUTIVE COMMITTEE

## CO-CHAIRS

Geraldine Acuña-Sunshine '92  
Michael T. Kerr '81, P'19, '12, '08

## VICE CHAIRS FOR ASSOCIATES GIVING

Eryn Ament Bingle '95  
Thomas P. Hirschfeld '83, P'19

## VICE CHAIR FOR REQUESTS AND GIFT PLANNING

Scott A. Abell '72, P'07, '02

## VICE CHAIRS FOR LEADERSHIP GIVING

Deborah A. Cincotta '94  
John A. Ferry '98

## VICE CHAIRS FOR PARTICIPATION

John W. Boynton IV '88  
Erica Mitnick Klein '00

## VICE CHAIRS FOR RECENT GRADUATES

Elizabeth Berylson Katz '08  
David E. Johnson '04

## VICE CHAIRS FOR REUNION GIVING

Ashley Leeds '80, P'16, '15, '12  
John J. Moon '89, PhD '94

## CO-CHAIRS OF THE WEST COAST COUNCIL

Alastair A. Mactaggart '88  
Theodore R. Samuels II '77, P'14, '13

## CO-CHAIRS OF THE HARVARD COLLEGE FUND PARENTS COMMITTEE

Elizabeth W. '90 and  
William L. Robbins '90  
Adam and Jan Waterous P'18, '14

## CO-CHAIRS OF THE GRADUATE SCHOOL FUND

Alberto F. Ades '92, PhD '94  
Stacy S. Dick '78, PhD '83

## MEMBERS-AT-LARGE

Janet Nezhad Band '83, P'19, '17  
Kenneth G. Bartels '73, P'09, '06  
Sean D. Carney '91  
William B. Decherd '01  
Philip N. Duff '79  
Joseph B. Fuller '79, P'13, '10, '10  
Alan Jones '83, P'16  
Elena Hahn Kiam '85, P'18, '16  
Jonathan C. Korngold '96  
Jeffrey D. Lee '97  
Matthew R. Mitchell '01  
Jennifer M. Perini '85

## FORMER CHAIRS

Sandra M. Edgerley '84, P'19, '17, '16  
Charlie J. Egan Jr. '54, P'86, '83, '83  
Catherine A. Gellert '93  
Michael F. Holland '66, P'04, '00, '95  
Carl J. Martignetti '81  
Ernest E. Monrad '51, P'84, '75  
Diana L. Nelson '84, P'16, '15  
Lisa Roumell '81  
Nicholas J. Sakellariadis '73,  
P'16, '13, '11, '10  
Gwill E. York '79, P'18, '14



# STRENGTHENING COMMUNITY, SUSTAINING HARVARD

Whether you are fundraising for your class reunion campaign, for a specific program, or for a current Campaign priority, you are not alone in your efforts. Thousands of alumni and parents make up the volunteer community every year because they are energized by Harvard's mission and compelled to make a difference, just like you.

When you volunteer, attend events, and give through the Harvard College Fund, you help create a stronger network and inspire increased support. We encourage all alumni to engage with us and the Harvard Alumni Association, which offers networking programs, reunions and class-based activities, clubs and shared interest group programs, public service projects, continuing education programs, travel programs, online services, and alumni events around the world.

Together, the Harvard College Fund and the Harvard Alumni Association rely on volunteers to champion ways to stay close to Harvard. By encouraging conversation with alumni leaders and connecting alumni to students and campus experiences, you are strengthening the enduring relationship that enables our success.

*Learn more about the ways you can connect with Harvard:*

**[alumni.harvard.edu/haa](https://alumni.harvard.edu/haa)**

# JUST A FEW EXAMPLES OF DONOR IMPACT

## • FINANCIAL AID

Financial aid not only gave Viet Tran '16, a first-generation college student from Texas, the chance to go to Harvard, but also the freedom to focus on his classes in neurobiology without having to juggle multiple jobs. As a new graduate, he can explore a career in healthcare unburdened by student debt.

## • ARTS IN THE HOUSES

House Renewal has rejuvenated beloved spaces, like the Emerald Theater in Leverett House, which now has state-of-the-art electronics and lighting and can host community-wide events. Renovations such as these boost interaction, foster relationships, and enhance House life.

## • PIONEERING INNOVATIONS

Harvard engineering professor David Mooney is developing nanomaterials that can reprogram the immune system to recognize and attack cancer cells. These materials could be the building blocks for an effective vaccine for all kinds of cancers.

## • OUTSTANDING FACULTY

Sarah Lewis '01, assistant professor of history of art and architecture and of African and African American studies, has returned to Harvard after having served in curatorial roles at the Museum of Modern Art and the Tate Modern, and authored the bestseller *The Rise: Creativity, the Gift of Failure, and the Search for Mastery*.

*Read more:* [alumni.harvard.edu/volunteer-resources/stories](https://alumni.harvard.edu/volunteer-resources/stories)

# OUR GUIDING PRINCIPLE: WE ALL HAVE SOMETHING TO GIVE

Alumni and parents who give back to Harvard continue a time-honored partnership across generations. A gift is an investment in Harvard's mission and aspirations, an endorsement of its leaders, and a meaningful way to demonstrate appreciation—for your experiences, opportunities, and friendships.

Every gift made through the Harvard College Fund has an impact on life at Harvard today. To sustain our excellence, we must work together to increase the number of donors who contribute to Harvard every year. We encourage every member of the Harvard community to join us in our efforts.

## 1926

The Harvard Fund Council convenes to send **the first appeal to College alumni**. In this first year, 3,261 alumni from over 600 cities in the U.S. and abroad donate nearly \$125,000 to support the College.

## 1961

The Harvard College Fund's first coordinated **Senior Gift campaign** is a resounding success, as nearly one-third of seniors make three-year pledges to express their gratitude to Harvard.

## 1979

President Derek Bok announces the **Harvard Campaign**, the largest capital drive in Harvard University history. Among other priorities, it supports Widener Memorial Library.



# GIFTS OF ALL SIZES MAKE A BIG DIFFERENCE AT HARVARD

In 2015–2016, more than 41,000 individuals contributed through the Harvard College Fund.



*\*Assumes 5% payout*

## 2008

The **1636 Society** is established to recognize loyal donors who give year after year through the Harvard College Fund, growing to 44,000+ members in 2015.

## 2011

The **Harvard-Yale Participation Challenge** kicks off as a way to spark HCF giving around the annual football rivalry. The challenge is conceived by Roberta Osborne '09.

## 2013

The **Harvard Campaign for Arts and Sciences** publicly launches with a goal of raising \$2.5 billion for financial aid, faculty teaching and research, House Renewal, the School of Engineering and Applied Sciences, and unrestricted annual support.





## YOU HAVE RAISED YOUR HAND TO HELP... WHAT'S NEXT?

### › GIVE

LEAD BY EXAMPLE AND MAKE A GIFT EVERY YEAR.

### › ASK

ENCOURAGE OTHERS TO VOLUNTEER AND SUPPORT HARVARD. DETERMINE WHO YOU WILL CONTACT, MAKE A PLAN, AND REACH OUT TO THOSE ON YOUR LIST.

### › PARTICIPATE

JOIN US FOR VOLUNTEER EVENTS AS OFTEN AS YOU CAN, AND STAY IN REGULAR TOUCH WITH HARVARD COLLEGE FUND STAFF AND VOLUNTEER LEADERS.

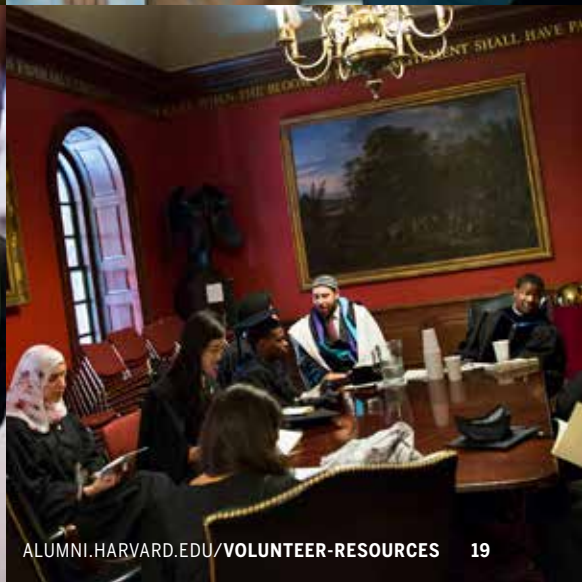
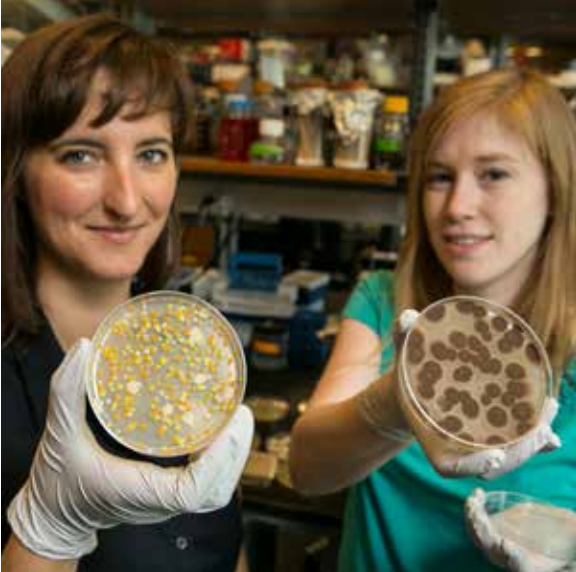
# HARVARD FUNDRAISING BASICS

Successful fundraising starts with making a connection. Time and time again, we have found that sharing why you support Harvard inspires others to do the same. We encourage you to think about what Harvard means to you and why you have chosen to dedicate your time and resources. Is it because you received financial aid? Is it the friendships you made with your Housemates and teammates? Is it that seminal class in computer science that changed your life? Perhaps knowing that you are supporting new research and promising scholars inspires you.

Whatever your reasons, please share them with your peers. Ask how Harvard impacts their lives or about a favorite memory. These recollections can prompt conversations that lead to meaningful support. Your personal outreach is what helps us attain our shared goals and increases the number and size of gifts each year.

Many alumni and parents make donations at the end of the calendar year in December or at the end of Harvard's fiscal year on June 30. Keep these dates in mind as you plan your approach and use them to encourage your peers.

We ask that you complete your assignments within an agreed-upon time frame. If you can't complete an assignment, please let your Harvard College Fund officer know.



# HERE ARE SOME GUIDELINES TO HELP YOU GET STARTED:

## 1. PLAN YOUR APPROACH

- Think about why Harvard is important to you. Why do you give?
- Brush up on the background and interests of your peers. You will receive biographical information to help prepare for your conversations.
- Be confident. Most alumni and parents are happy to contribute and simply need to be asked. You don't need an answer for everything—questions can help you understand an individual's philanthropic interests and motivations.

## 2. HAVE A CONVERSATION

- Share your story. Explain why you give to Harvard and why you believe a gift can make an impact.
- Be direct. "Will you join me?" is often the most powerful question you can ask.
- Discuss gifts already committed by peers and ask for a specific amount. (Example: "Can we count on your help? Would you consider a gift of \$\_\_\_\_\_?") Harvard College Fund officers will provide you with contextual materials such as a gift scale or box chart, which are especially helpful when discussing larger gifts.
- For reunion campaigns and parent solicitations, share that pledges of \$5,000 or more may be paid over time (up to five years).

- Listen carefully and don't expect an immediate commitment, especially for larger gifts.
- Inquire about matching gifts. Ask whether a donor qualifies for a corporate matching program.

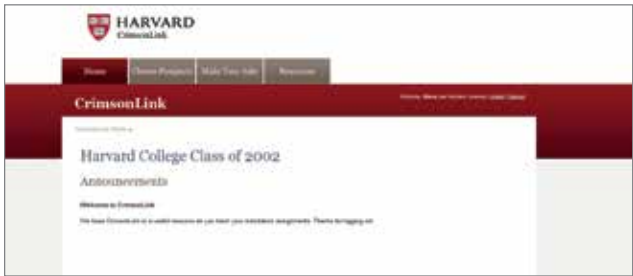
### **3. FOLLOW THROUGH**

- Agree on next steps and maintain contact.
- Send a thank you note that includes the specific pledged or proposed gift amount.
- Let donors who make multiyear pledges know that they will receive confirmation of details and periodic reminders from Harvard.
- Follow up with your staff contact once you have secured the pledge or gift. Harvard College Fund staff will handle all administrative details and ensure a smooth experience.



# CRIMSONLINK

Harvard College Fund staff will help you identify peers who will benefit from your personal contact—your “assignments.” CrimsonLink, a secure online portal for volunteer fundraisers, is designed to help you manage your outreach. Visit [alumni.harvard.edu/volunteer/crimsonlink](http://alumni.harvard.edu/volunteer/crimsonlink).



*If you have questions about this tool, please contact your Harvard College Fund officer or email [crimsonlink@harvard.edu](mailto:crimsonlink@harvard.edu).*

# HCF VOLUNTEER WEBINARS

**[Alumni.harvard.edu/webinars](http://Alumni.harvard.edu/webinars)** is your hub for virtual events designed exclusively to support your role as an ambassador for Harvard College and the Faculty of Arts and Sciences.



*To learn more about the webinar series and to gain access, please contact your class officer.*

## WAYS TO GIVE

► **BY MAIL:**

Alumni and Development Services  
124 Mount Auburn Street  
Cambridge, MA 02138-5795

ENCLOSE CHECK PAYABLE TO:

“President and Fellows of Harvard College”

In the check’s memo section, please specify the allocation of the gift.

► **BY PHONE:**

1-800-VERITAS (837-4827)

► **ONLINE:**

[alumni.harvard.edu/give](https://alumni.harvard.edu/give)

► **GIFTS OF STOCK:**

You may make a gift of stock through our online form or by contacting:

Harvard Management Company  
Trusts and Gifts Department  
600 Atlantic Avenue  
Boston, MA 02210-2203

Phone: 866-845-6596

Fax: 866-457-6598

Email: [security\\_gifts@hmc.harvard.edu](mailto:security_gifts@hmc.harvard.edu)

► **GIFT PLANNING**

617-496-3205

[ogp@harvard.edu](mailto:ogp@harvard.edu)

[alumni.harvard.edu/ogp](https://alumni.harvard.edu/ogp)



## DONOR RECOGNITION

We appreciate every gift and have many ways to demonstrate gratitude for donor generosity. It may be helpful to share how commitments are recognized during your conversations with peers:

- Communications from Harvard leadership
- Inclusion in print and online publications
- Invitations to special events
- Memberships in giving societies

**LOYALTY:** The 1636 Society welcomes donors who make consecutive annual gifts of any amount.

**LEADERSHIP:** Associates Giving and the Harvard Yard Society recognize donors who give at leadership levels.

**LEGACY:** The John Harvard Society celebrates individuals who make a life income gift or bequest.

You can learn more about specific recognition programs by gift level, as well as details about each of our giving societies, online and in your *Benefactor Handbook*.

*To learn more, please visit:* [alumni.harvard.edu/volunteer-resources](https://alumni.harvard.edu/volunteer-resources)

# GLOSSARY OF FUNDRAISING TERMS

**Assigned/cleared for solicitation**

Assignment made but contact not yet initiated.

**Complete**

Volunteer outreach efforts completed.

**Declined**

Individual refused solicitation.

**Fiscal year**

Runs from July 1 to June 30.

**Lapsed**

More than five years have passed since donor's last gift.

**LYBUNT**

Donor gave Last Year But Unfortunately Not This year.

**Non-donor**

Donor has never contributed to the Harvard College Fund.

**Pledge**

A commitment to make a future or multiyear contribution.

**Reunion campaigns**

During five-year milestones, classmates work together to inspire peers to give back in support of the Harvard experience and our future.

**SYBUNT**

Donor gave Some Year (at least once in the past five years), But Unfortunately Not This year.

## TWO TYPES OF PHILANTHROPIC FUNDING RESOURCES

**ENDOWED FUNDS:** Dedicated and permanent sources of philanthropy. Funds are invested by Harvard Management Company, and a responsible percentage is distributed annually for specific programs, departments, or purposes.

**IMMEDIATE-USE FUNDS:** Flexible funds that are used to supplement areas not fully covered by the endowment and to seed new opportunities. These funds must be replenished every year.

# CONTACT US

We encourage you to reach out to your Harvard College Fund officer, your co-chairs, and other volunteer leaders.

**Phone**

617-495-1636

**CrimsonLink**

[alumni.harvard.edu/volunteer/crimsonlink](http://alumni.harvard.edu/volunteer/crimsonlink)

**Volunteer Resources**

[alumni.harvard.edu/volunteer-resources](http://alumni.harvard.edu/volunteer-resources)

**The Harvard Campaign for Arts and Sciences**

[campaign.harvard.edu/fas](http://campaign.harvard.edu/fas)









# HARVARD

## College Fund

**[ALUMNI.HARVARD.EDU/VOLUNTEER-RESOURCES](http://ALUMNI.HARVARD.EDU/VOLUNTEER-RESOURCES)**