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Welcome!

Dear Harvard College Fund Volunteer,

Thank you for participating in your reunion campaign. We are very grateful for your leadership and your commitment of time and resources. Your meaningful involvement and hard work will ensure our continued success in supporting Harvard’s undergraduate and University priorities.

This guide presents an overview of how to structure a reunion gift campaign. You may find these principles useful in other fundraising activities as well. We encourage you to visit yardline.harvard.edu to access solicitation assignments, an electronic version of this handbook, and other helpful fundraising materials.

We hope that you enjoy the experience of advancing your class’s fundraising activity. Please let our team at the Fund know how we can support your efforts.

With gratitude,

Charlie Cardillo ’91
Executive Director

Alice Roebuck
Director of Reunion Giving
What Is Harvard College Reunion Fundraising?

The Harvard College Fund (HCF) maintains a robust and highly successful tradition of reunion giving. Every five years, classes engage in organized fundraising campaigns driven by reunion milestones.

These campaigns aim to inspire high levels of class participation and secure leadership contributions in support of Harvard’s current priorities. Our reunion efforts involve large gift committees and require dedicated volunteer leadership. From the 5th reunion to the 65th and beyond, reunion campaigns build community and form the backbone of the Harvard College Fund.

Our reunion drives generate fundamental resources for the Faculty of Arts and Sciences (FAS). These are not incremental funds; cumulative class gifts support financial aid, curriculum development, advising, arts, athletics, residential life—everything that sets Harvard apart. Commitments secured during reunion years become a planned component of the FAS budget for the next four years.

As Harvard’s financial model continues to evolve, our reunion campaign model must also adapt to align with Harvard’s ambitious goals. For every campaign, the Harvard College Fund team will work with you to establish the proper blend of endowment and immediate-use contributions—a blend that includes gifts designated to Harvard’s timeless priorities in perpetuity as well as those given for immediate needs. Every contribution makes a difference and the balance of designations ensures a winning result.

Harvard continues to succeed thanks to its loyal alumni/ae leaders, who have provided guidance and support for generations. Your gifts enable scores of promising young scholars and world-class faculty to explore, teach, and create. Your support makes possible leading-edge research and helps transform the undergraduate experience. Your time and resources change the lives of people who go on to change the world.

Simply put, your hard work matters. Thank you for investing your energy in this important process—and know that the Harvard College Fund team is ready to partner with you to achieve our shared goals for the College and the FAS.
Planning a Reunion Campaign

Harvard reunion campaigns follow a model that has proven successful year after year. Below, you will find some general guidelines for your reunion effort. We recognize that every class is different. This framework provides flexibility for each class and its stage in life.

Adjacent classes may have significantly different wealth, leadership, personality, and history. Younger classes differ substantially from older classes, as activities, interests, understanding of philanthropy, and capacity for giving evolve.

For every reunion campaign, it is crucial to create an engaged and effective gift committee. The gift committee is led by co-chairs (typically the most generous, visible donors in the class). Co-chairs set the bar, the strategy, and the tone of the drive. They also work together with the HCF to establish a fundraising goal that includes an appropriate mix of endowment and immediate-use contributions.

Immediate-use gifts go directly to the students, faculty, and programs that require them. Endowment giving supports time-less needs—like professorships—that serve future generations. Both kinds of giving are critical to Harvard.

Over the course of the drive, you will build involvement, enthusiasm, and, ultimately, commitment to an individual gift. Conference calls with class leaders, committee meetings, regular reports, and events are standard components.

Throughout the campaign, you will work closely with your HCF class officer and other Harvard staff members. The HCF will handle all administrative details. The more your officer knows about your class, the more he or she can offer help in making effective solicitation assignments and coordinating visits with administrators and faculty.

It also helps to collaborate early with your Harvard Alumni Association reunion program committee. Synergy among all of the reunion elements facilitates success in your overall experience and your gift drive.

Finally, you will enjoy more support during the next reunion cycle if you maintain connections in non-reunion years through social events and the annual giving program.
To support your peer-to-peer reunion campaign, we encourage you to take advantage of our online volunteer portal: yardline.harvard.edu. This new interface allows you to select and track your peer solicitation assignments, obtain up-to-date giving histories and contact information for your prospects, and access helpful information in our new resource library.

Key Points for Success

Start early
- Begin planning at least 12–24 months in advance.
- Seek advice from reunion chairs and leaders in other classes.
- Identify leaders for major gifts, special gifts, immediate-use gifts, and participation.
- Seek broad, diverse, and regional representation.
- Hold pre-reunion regional events to build enthusiasm.

Enlist a strong gift committee
- Establish enlistment guidelines and gift-level expectations. Lead by example and make your own gift.
- Enlist leaders personally.
- Be specific when describing expectations—you are asking fellow classmates to make a gift and to complete solicitation assignments.
- Assign a manageable number of solicitations to each committee member.
- Remember: committee members seldom raise more from an individual than they themselves have given.

- Do not be shy about putting your classmates to work.
- Realize that most of the reunion campaign dollar total will come from your committee.

Inform and educate
- Familiarize yourself with Harvard’s giving priorities and stewardship programs at yardline.harvard.edu.
- Expect that everyone is pressed for time. Your personal outreach will make a difference.
- Recognize that uninformed classmates may be difficult to engage.
- Give everyone plenty of advance notice regarding events and deadlines.

Bring your team together
- Attend the HCF Assembly and Kickoff Meeting in Cambridge in the fall.
- Hold regular co-chair and leadership conference calls to keep your campaign on track.
- Hold meetings to identify donors and volunteers. Inform classmates about Harvard’s fundraising priorities.
- Conduct regional receptions and dinners with key prospects as hosts/hosting committees.
- Dedicate some time early on to solicitation training.

Set fundraising goals with care
- Recognize that the top 10 gift decisions will set the pattern of giving for everyone. Discussions with these prospects must start early in the effort.
Include a specific target for immediate-use gifts as a component of your overall campaign. (Your class officer will guide you in this process.)

- Keep your sights high and look for opportunities to celebrate successes at every level of the gift scale.
- Do not underestimate an individual’s willingness to be generous.
- Establish specific gift amounts.
- Remember to use goals strategically throughout your campaign to maximize results.

**Push for participation**
- Recognize the important role of participation chairs and volunteers.

- Be creative about your participation strategy. A combination of outreach by phone, email, and student calling can help you reach your goal.

**Communicate regularly**
- Class news, upcoming events, goals, and progress to goals will be listed on your class page on yardline.harvard.edu.
- Keep all committee members informed.
- Make communications short, readable, and personal.
- Celebrate the work of committee members.
- Visit yardline.harvard.edu regularly to report solicitation progress and track important milestones.
- Ask the HCF staff for anything you need.

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**WHAT’S YOUR STORY?**

Your ability to articulate your own, authentic reasons for supporting Harvard will be your most powerful tool when soliciting others. While the HCF staff can provide myriad facts and figures to make the case for giving, it is your own narrative that can be the most compelling.

When thinking about how to tell your story, consider what Harvard means to you and why you choose to give of your time and resources. Some people give to Harvard to express affection, loyalty, or a desire to give back. Others give to sustain Harvard’s role as a global leader in higher education. Maybe you give to help Harvard advance teaching and research that will benefit the world.

When speaking with classmates, don’t be afraid to make the discussion personal—ask them how Harvard has affected their lives or encourage them to share favorite memories. You might ask, “Does one classmate or faculty member stand out in your memory? If so, why?” The connection you create should be a positive experience for both of you!
Reunion Campaign Calendar

Reunion campaigns follow a carefully designed calendar intended to build effective committee structures and maximize fundraising results. Ideally, co-chairs are enlisted 12–24 months before June of the reunion year, so that there is sufficient time to build the gift committee, generate momentum, establish goals, and complete solicitations before fiscal year-end, June 30.

Committee formation
During the spring and summer of the year before the reunion, co-chairs enlist vice chairs and gift committee members. In the spring or early fall, committee meetings are held in the areas with the highest concentration of class leaders (typically New York, Boston, and California). Live committee meetings build involvement, commitment, and enthusiasm for the drive and provide valuable information for assigning solicitations and ask levels. Co-chairs devise strategies for these meetings and ensure that key people attend.

Solicitations
Before Thanksgiving, committee solicitations begin in earnest and continue throughout the winter and spring. You will have convenient access to your solicitation assignments and materials through the HCF’s online portal: yardline.harvard.edu. To complement your individual activity, the committee receives regular status reports and updates from Cambridge. HCF fundraising success depends on peer-to-peer outreach—your influence as a volunteer cannot be overstated.

Assembly and Kickoff (Cambridge)
In October, the HCF holds an annual Assembly to inform, thank, and reengage attendees in their commitment to the College. The Assembly weekend begins with a Kickoff Meeting for all HCF volunteer leaders. Friday evening events feature faculty members and/or illustrious alumni speakers. Saturday symposia aim to immerse alumni in the intellectual life of the College.

Participation
While co-chairs and gift committee members solicit larger gifts throughout the year, parallel efforts are under way to achieve participation goals. The participation committee will be busy with broad outreach—via phone, direct mail, email, and online communications—to build awareness and boost participation.
Harvard College ReConnect (West Coast) and Harvard College Fund Winter Summit (New York City)
These two events are held annually every winter. The Harvard College ReConnect includes volunteer training and networking as part of a two-day event featuring faculty seminars and an insider’s update from Cambridge. The Winter Summit provides opportunities to connect as a HCF community and assess our midyear progress toward class-specific and Fund-wide goals.

Conference calls
Conference calls with co-chairs and HCF class officers occur monthly. These calls typically focus on the campaign status, events, classmate engagement strategies, solicitation assignments, and next steps. It can also be useful to schedule conference calls for all active solicitors during your campaign. The HCF Executive Committee hosts conference calls at key points during the year for reunion co-chairs across the classes. This ensures that all individual reunion campaigns remain connected to Fund-wide goals and messages.

Harvard College Fund Annual Meeting (Cambridge)
This meeting for all HCF volunteer leaders is held on Class Day before Commencement and spring reunion events. It is an occasion to celebrate important progress toward our fundraising goals and discuss strategies for the final days leading up to June 30.

June 30
Deadline for all reunion campaign gifts and pledges.
### Sample Program Planning Calendar

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<td><strong>Meetings</strong></td>
<td><strong>Communications</strong></td>
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<td>Determine regions of priority</td>
<td>Initial meeting of co-chairs</td>
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<td>Identify classmates to enlist as regional vice</td>
<td>Identify classmates who would be effective</td>
<td>Set committee meeting dates for fall</td>
<td>Letter and email from co-chairs to class</td>
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<td>Co-chairs formally enlist vice chairs</td>
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<td>inviting classmates to fall meetings</td>
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<td>Committee members continue to make contact with</td>
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<td>assigned classmates and start discussion of gifts</td>
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<td>before close of tax year</td>
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<td>Harvard College Fund Winter Summit at Harvard Club of NYC</td>
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<td>HCF direct mail appeal</td>
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<td>Report and celebrate final results!</td>
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Organizing the Gift Committee

To conduct a successful reunion campaign, enlist key classmates to serve on the reunion gift committee as early as possible. Make sure your leadership can set an example for the size of their gift and their level of commitment to Harvard.

A top-down approach
Organizing a reunion gift committee—identifying, soliciting, and enlisting classmates—is a “top-down” process. Co-chairs are identified, solicited, and enlisted first. Co-chairs in turn recruit vice chairs, and, together, they assemble the committee with help from the HCF and other staff.

Collectively, the gift committee is responsible for personally soliciting the top 100–300 classmates with the greatest potential to be generous. The participation team solicits the rest of the class.

Class gift chairs
A successful reunion campaign requires enlisting visible co-chairs to serve in a leadership capacity in terms of work, effort, and giving. Where feasible, they should come from different backgrounds, professions, and regions of the country. This will help to attract a more diverse committee and ultimately solicit a broader cross-section of the class.

Keep in mind that soliciting and enlisting or reenlisting co-chairs often require a considerable amount of time and effort involving Harvard staff, administrators, faculty, or other alumni.

A NOTE ON THE ROLE OF IMMEDIATE-USE GIVING
Some reunion campaign leadership teams find it useful to include a designated champion for immediate-use giving. An ambassador dedicated to this kind of support can help focus the reunion fundraising effort in a meaningful way, enabling the FAS dean to apply resources directly to core priorities in the near term. This individual (or group of leaders) typically makes a significant immediate-use commitment. In addition, volunteers in this role focus their solicitations on key prospects who also have the potential to make generous immediate-use gifts and/or blended gifts that support both immediate needs and long-term endowment opportunities.
Vice chairs
Co-chairs, working closely with their class officer, decide on the appropriate gift levels for the vice chairs and special gifts committee. The involvement of the vice chairs varies, but their gift amounts must be consistent with the high level of their visible leadership position.

Often vice chairs are assigned regional responsibility, such as a vice chair for the West Coast. However, these leaders may also be willing to solicit classmates outside of their region based on relationships and interests.

Special gifts committee
The number of committee members varies, as does their level of involvement. Committee members are expected to contribute at a level that exemplifies leadership. They are also asked to assist in determining appropriate solicitation levels for classmates, and to make the case for Harvard support to their peers.

The HCF officers and other staff can help enlist the committee. Typically, the class officer surveys class members the year before a reunion about their interest in committee involvement.

TIPS ON ORGANIZING AN EFFECTIVE REUNION GIFT COMMITTEE

- Start early. Working closely with HCF staff, solicit and enlist class leaders 12–24 months in advance of the reunion.

- Solicitation may precede, be part of, or follow enlistment. However, setting clear gift-level expectations is essential.

- Use an individual’s giving and volunteer history as a guide when considering possible leadership.

- Seek out those who will commit to doing the work and completing assignments. Also keep in mind that you may decide to include some individuals as committee members in recognition of their generosity regardless of their appetite for soliciting others.

- Be inclusive. Cover the United States and key international cities.

- If possible, designate a champion for immediate-use giving.

- Realize that most of the reunion campaign dollar total will come from your committee.
Participation chairs

It helps to have participation chairs who are both familiar with a broad range of classmates and willing to devote considerable energy to the campaign. They must set an example with their enthusiasm and commitment.

Some classes are fortunate to have loyal classmates who serve in this position year after year. In other classes, co-chairs work with HCF staff to identify the right person or group of leaders to mobilize grassroots support and maintain momentum for successful participation.

Gift chairs and participation chairs should confer on the participation goal.

Reunion Class Gift Committee
Sample Organization

Co-chair(s)

Vice chair(s)

Special gifts committee

Participation chair(s)

Participation committee
Goal Setting

Setting an overall class goal is an important exercise. A goal raises sights, inspires your work, and provides the class with a context for what you are trying to achieve. While the process may take shape early on, the final, public goal may be announced in the beginning, middle, or toward the end of your campaign. Depending on your class, a dollar goal may be just one of your objectives. Class leaders may consider additional goals, such as increasing the total number of donors at participation level.

Goal Setting Overview

How does a class decide what is achievable and aspirational? This can be a complicated process, but having certain information can help. At the beginning of your campaign, your class officer will supply you with reunion gift histories of your peer classes, current reunion records, and materials that provide a baseline of potential “ask” amounts for your classmates.

Reunion volunteers can provide unique insights on suggested “ask” amounts based on what you know of your classmates. Using this data as a starting point, you can set a preliminary goal and refine it as the year progresses. Early commitments from co-chairs are an important indication of what the class can achieve.

Including a specific immediate-use giving target is an important goal of all campaigns. This goal ensures that reunion fundraising efforts remain closely connected to the College’s ongoing needs in areas such as financial aid, curriculum development, advising, athletics, study abroad, and more. Your class officer will work with you to define the appropriate balance of gift types within your broader goal.

Compare reunion gift histories

The achievements of earlier classes offer a rough gauge of what your class may accomplish at a comparable point in time. Still, as the “Sample Reunion Gift Range Histories” (page 16) shows, gift totals of adjacent classes can vary widely. The difference typically comes from
gifts at the top. One or two exceptional gifts can make a significant difference in the bottom line. Assess whether or not your class has this kind of potential.

**Review your own prior reunion results**
As a class matures, its own track record may inform the goal for the next reunion drive. There is, however, an ever-present opportunity to identify new donors or engage classmates who have not been involved previously. The class giving history can help spur ambitions to achieve the greatest potential and inspire both new and seasoned volunteers and prospects alike.

**Consider reunion records**
Would your class enjoy the challenge of breaking a longstanding record? Or is that too much of a reach? Decide what would be the best, most realistic, and most energizing goal. Analyze how many gifts your class needs at each level to determine what may be attainable.

**Estimating a goal**
Using a reunion-specific gift history, your gift committee can build a gift scale that projects the number and size of gifts needed to meet a particular goal. Generally, you will need four prospects for each gift at the upper levels and two prospects for each gift at the lower levels. The goal worksheet on page 17 demonstrates this concept.

---

### Assessing Class Giving Potential

This exercise is often most successful in one-on-one meetings with your class officer. In this discussion, you should:

- Estimate what you believe an individual has the potential to give over five years, not what you think the classmate is inclined to give.
- Identify only those you know personally and suggest possible connections between other volunteers and classmates if you know of them.
- Indicate your level of comfort to solicit individual classmates.

The information that you share with Harvard staff will be kept confidential.

### Managing the Process

When you set a goal publicly at the beginning of the campaign or decide to hold off sharing it until later, the gift scale can help you manage results. This gift scale serves as a guide of where your time and focus should be spent relative to solicitation activity. As you approach the spring, this tool will help you focus on uncompleted solicitations and add or reassign important asks if necessary.

Since the beginning of the drive, you might have participated in a gift committee meeting, a number of conference calls, regional class events, and Harvard College Fund organized events. All of these activities have stimulated solicitations. Your class is doing well, with some important leadership gifts secured,
and a solid foundation established for participation.

What should you do next? The quick answer: focus on the top of the gift scale and continue to work with undecided and unassigned prospects. The longer answer: consider how to create some momentum and enthusiasm for the final push of the campaign. Rather than a bottom-line number, you may try to reach a short-term goal such as securing a number of donors at a particular level of giving. (See sample box chart on page 18.) Another suggestion may be a targeted challenge to help you finish the drive with a focused effort on participation or area of giving.

A note on Harvard’s reunion campaign philosophy
Co-chairs sometimes ask about designating the entire reunion class gift to a scholarship, professorship, or another specific area. The HCF discourages such ideas for two reasons.

Designating the entire class gift can have a negative effect, lowering rather than raising sights. A donor who could endow a scholarship alone may instead give less to a class scholarship.

Also, designation of the entire class gift to an endowed fund runs counter to the Fund’s longstanding mission of raising flexible gifts that can be used immediately. Flexible, or unrestricted, gifts enable the College to meet ongoing and emerging needs. In 2004, for example, these funds enabled the creation of the Harvard Stem Cell Institute. No endowment funds had anticipated this need.

Restricted, endowed funds cannot meet unanticipated needs or opportunities, which is why a myriad of gift designations and types are so important.

Challenges and matching funds
The HCF encourages the strategic use of motivational devices such as matching funds and challenges, which can be effective if carefully structured and well timed (particularly in the closing months of the campaign). Ask your class officer about existing challenge funds, or discuss the possibility of creating one specifically for your class.

RULE OF GIVING

Analysis of gift receipts at Harvard and at other institutions shows a common pattern, or “rule” of giving. For every 1,000 gifts, the top 10 percent accounts for at least 90 percent of the total dollar amount raised.

Because the top 100 donors are so important, focus at the outset on identifying, engaging, and soliciting prospects with a high capacity. Their gifts will impact others’ decisions and the final outcome of the drive.
## Sample Reunion Gift Range Histories

Results for three different consecutive classes in a 30th Reunion Campaign

<table>
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<th>Gift Range</th>
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<th>CLASS A</th>
<th># of gifts</th>
<th>CLASS B</th>
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<td></td>
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<tr>
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<td>$5,000,000</td>
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</table>

**FINAL CAMPAIGN TOTAL**

| $12,000,000 | $10,000,000 | $15,000,000 |

Note that the number and size of gifts at the top level have the greatest impact on the bottom line. At the middle and lower levels, there is more similarity across classes. Immediate-use subtotals are part of the overall class total.
To achieve the expected total number of gifts at these levels, the ratio of asks to expected gifts must approximate 4:1.

<table>
<thead>
<tr>
<th>Gift Range</th>
<th>Prospects Identified (early fall)</th>
<th>Specific Asks (by Dec. 31)</th>
<th>Expected # of Gifts</th>
<th>Expected Total</th>
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<td>Many</td>
<td>Many</td>
<td>Many</td>
<td>200,000</td>
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</tbody>
</table>

Immediate-use target $4,000,000

OVERALL GOAL $12,000,000
Sample Reunion Box Chart

Overall Goal: $12,000,000
Overall $ to Date: $9,700,000
Immediate-Use Goal: $4,750,000
Immediate-Use $ to Date: $3,100,000
Donor Goal: 1,040 (65%)
Donors to Date: 600 (48%)
(base=1,600)

Key

Endowment gift
Immediate-use gift
Blended endowment/immediate-use gift
Potential gift

PARTICIPATION
Goal: 65% Participation
Solicitation

The success of Harvard’s reunion fundraising depends on peer-to-peer outreach. The role that you, as a volunteer and donor, play in encouraging classmates to give simply cannot be matched. Your willingness to share personal motivations for supporting Harvard inspires others to step up and do the same. Visit yardline.harvard.edu, the HCF online volunteer portal, to access solicitation assignments and other helpful materials.

Everyone approaches the solicitation process differently. Some find it difficult; others enjoy the challenge. Experience makes it easier. New solicitors may welcome advice from more experienced hands—veteran volunteers or HCF staff. Even if the following tips are familiar, you may want to revisit some of them.

As you may know, the solicitation process varies with the scale of the “ask.” Asking for a $25 participation-level gift differs substantially from asking for $5,000 to $25,000, or $100,000 or more. Naturally, the preparation, timing, and complexity of these requests all differ.

Participation-level gifts are more transactional than leadership-level gifts. A donor decides quickly via a written appeal or phone call and completes the gift by fiscal year-end. This gift requires positive feelings, but no close connection to the solicitor.

Larger gifts take more thought and preparation. Relationships become more important and several conversations may occur before a donor commits to a gift. The donor may fulfill a pledge over the course of several years.

Leadership gifts require even more care. Donors make significant gifts only when they are ready. Preparation may extend over many years. When the engagement process begins, Harvard and the donor typically do not know the size or nature of a proposal. Careful listening is vital; over time, the fit between donor and Harvard priority emerges. The donor learns the opportunities, the stakes, and the level of support needed for success.

Your class officer can provide guidance with leadership-level solicitations, and help to align a donor’s philanthropic goals with Harvard’s needs. When done well, engagement leads to commitment and enjoyment of philanthropy. Each gift creates a base for future solicitations.
Guidelines for Soliciting

Plan your approach

- Think about why Harvard is important to you, why you support Harvard, and what you want your classmates to know about why you are making a gift. (See “Share Your Story,” page 5.)

- Familiarize yourself with Harvard, HCF literature, and the various gift opportunities, and plan to use the proposal figure provided. It represents your class committee’s consensus on what they think this individual could contribute.

- Brush up on the background and interests of the classmates you will solicit. You will receive relevant biographical information about each person.

- Don’t underestimate the responsiveness of any classmate on your list. Chances are good that your classmate feels as strongly about Harvard as you do.

- Be confident. You need not have an answer for every question classmates have at this stage, but their questions will help you understand their special philanthropic interests. The Fund staff will help answer questions.

- Login to yardline.harvard.edu to access information on your assigned prospects and find helpful talking points about Harvard’s fundraising priorities.

Make the appointment

- Call or email your assigned classmates to arrange a time when it would be convenient to talk, either in person or by phone. They will probably know something about the reunion gift campaign and expect a call. Many will have attended a class dinner or reception. By arranging a time for a more lengthy conversation, you will be able to make your case more easily.

- Call familiar classmates first—this will help you get comfortable with the process.

- Be positive and upbeat. Don’t apologize or let anyone put you off. If your classmate says he or she already knows all about Harvard, say that you would still appreciate a chance to explain why you believe his or her participation is important to the class effort.

Conduct the meeting or call

- Be personal. Explain why you are giving to the College this year and why Harvard is particularly important to you. Your willingness to talk about your own gift and your decision to volunteer your time to Harvard’s fundraising effort will help convince your classmate to play a more substantial role. (See “Share Your Story,” page 5.)
Be direct. Discuss gifts already raised. This may help raise your classmate’s sights.

Be specific. You may want to use language such as: “I pledged $____ to our reunion campaign. Would you be willing to join me in pledging a gift of $____, payable over three years?” Or: “Can we count on your help? Would you consider a gift of $___?”

Listen. Don’t expect an immediate commitment for a large gift. Your classmate may need time to think or consult with others.

Inquire about matching gifts. If a classmate qualifies for a corporate matching program, larger pledges may be reasonable. Donors receive credit for both their pledge and the corporate match.

Follow through

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 classmate. Send a thank you note, naming any figure pledged or proposed. This will help to move the process forward.

Maintain any necessary additional contact. Many solicitations, especially at the major gift level, will require more than one discussion with a classmate.

After the gift

Promptly report outcomes to your class officer by email, phone, or at yardline.harvard.edu. Be sure to capture gift amounts and terms of payment accurately. If the gift is designated to a specific area, or if it involves a match, report that as well.

Donors making pledges will receive confirmation of pledge details from Harvard and periodic pledge reminders. It may be helpful to let classmates know this when you thank them.

Acknowledgments

Remember to send a personal note of thanks following each completed solicitation.

Harvard will acknowledge all written pledges. Special situations, such as gifts of securities or real estate, will receive letters of acknowledgment with specific details about the gift.

Class committee chairs will be advised of gifts so that they may express thanks on behalf of the class.

Special and major gift donors may receive a letter of thanks from the HCF leadership, FAS dean, or University president.
Sample: Introductory Letter or Email

[This letter should be only an introduction, not a form of solicitation.]

Dear ________:

On behalf of our class reunion committee, I hope to have the opportunity to talk with you about our class gift to Harvard on the occasion of our _____ reunion.

I have given a great deal of thought to why I give back to Harvard College, and I would like to share these thoughts with you. I will call next week and look forward to setting up a time to meet or talk that would be convenient for you.

Best regards,

Sample: Thank You Letter or Email

Dear ________:

It was wonderful to reconnect with you and to talk about our time at Harvard. Thank you again for your very generous response to my call regarding our reunion gift. We are truly grateful for your pledge of ___________. Your (unrestricted) gift helps keep Harvard strong by enabling it to meet significant commitments and respond to unexpect ed needs. (Or Your gift to the ______ fund will strengthen Harvard’s resources to support __________.) You will receive confirmation and thanks from Harvard as well.

I look forward to seeing you (at reunion) (sometime soon).

Best regards,

FAIR SHARE GIVING

Every reunion drive is structured so that classmates are asked to consider gifts based on individual capacity to contribute. Co-chairs and vice chairs focus on the largest gifts, special gifts committee members approach classmates for mid-range pledges, and participation chairs and volunteers focus on broad support from the class.

This approach conforms to well-established fundraising practice. Real success depends on “fair share” giving, or giving according to capacity. Donors who can do so make larger gifts, but they should not carry the full load by themselves. Participation at all levels produces considerable dollars, especially in the aggregate, and demonstrates overall support for the institution and a vote of confidence in Harvard’s mission.
Gift Planning

Planned gifts allow donors to support Harvard while receiving financial benefits from their gifts. Planned gift vehicles enable donors to structure a gift in different ways including outright, deferred, or bequest, using a wide variety of assets such as cash, appreciated securities, real estate, significant artwork, partnership interests, and more. Gift planning is the process of making a planned gift.

Life income plans can provide the donor (or other family members) with a stream of income for life or for a term of years. Other plans help the donor minimize income, gift, and/or estate tax, while maximizing his/her gift, depending on that individual’s particular situation. Through a blending of knowledge in charitable tax law and financial planning, Office of Gift Planning staff work closely with charitably motivated individuals to tailor strategies that meet their needs and those of Harvard. An overview of several popular gift planning strategies follows.

**Life Income Plans**

Life income plans can allow a donor to make a substantial gift to Harvard and retain an income from that gift for life or a term of years. At the death of the last beneficiary or at the conclusion of the term, the gift is released to Harvard for the purpose specified by the donor.

**Beginning at the 40th reunion, donors receive full Harvard College Fund class credit for the face value of a life income gift designated for the dean’s priorities.**

Popular life income arrangements include:

- Charitable remainder trusts
- Charitable gift annuities
- Pooled income funds

These arrangements can provide similar benefits, including:

- Income to one or two beneficiaries, for life or a term of years
- An immediate charitable income tax deduction
- Capital gains tax avoidance on a gift of appreciated property
- Investment diversification
- Professional investment and administrative services by Harvard Management Company at no separate cost
Charitable Remainder Unitrust
With the Harvard Charitable Remainder Unitrust, a donor contributes an irrevocable gift of cash, marketable securities, or other property to Harvard, as trustee of their unitrust. Harvard, in its role as trustee, pays one or more beneficiaries a variable income calculated as a fixed percentage of the underlying value of the unitrust principal as revalued annually. As the value of the unitrust principal changes over time, so too does the income. Income can be paid for life or for a term of years.

A unitrust can be established with a minimum gift of $100,000 for a beneficiary(ies) who is at least 50 years old, or $250,000 for beneficiaries between the ages of 45–49. If a donor transfers appreciated property, such as securities, to a unitrust, they avoid paying a tax on the capital gain. In addition, the donor receives a current income tax deduction for a portion of the gift.

There are two investment options available for Harvard-managed unitrusts: the endowment option and the tax-efficient option. With the endowment option, the unitrust is invested in “trust units” of the University’s endowment. The wide array of asset classes included in the endowment results in a broadly diversified portfolio with an attractive return-to-risk ratio. With this investment option, income to beneficiaries is taxed as ordinary income.

Alternatively, donors may invest their unitrust in a tax-efficient option that seeks to provide tax-favored dividend and long-term capital gains income, as well as tax-free income.

Once the unitrust is established, a donor can make additional gifts of $10,000 or more at any time. A trust can support the charitable purpose of the donor’s choosing at the College, including a named endowed fund. Harvard is also willing to serve as trustee of a charitable remainder unitrust that also benefits non-Harvard charities.

Example
Mr. and Mrs. North, ages 71 and 68, own securities worth $100,000, which they bought several years ago for $25,000 and which yield them an annual dividend of $1,200. The Norths would like to make a gift to Harvard in honor of Mr. North’s 50th reunion, but they need to retain an income from their gift in their retirement. By transferring their securities to a Harvard-managed unitrust, they immediately increase their first-year income to $5,000, and avoid paying any capital gains tax. In addition, they receive an income tax charitable deduction of about $40,000. They have designated their gift for financial aid.

Charitable Gift Annuity
A charitable gift annuity is a simple agreement by which Harvard, in exchange for a gift of cash, securities, or other property, promises to pay a fixed amount each year to one or two designated beneficiaries for life. Payments, which may begin immediately or be deferred to a future date, are fixed and backed by the assets of Harvard University. The annuity income, paid in equal quarterly install-
ments for the life of the beneficiary(ies), is determined by the age and number of the beneficiary(ies), the value of the assets, and the length of time (if any) before payments commence. The minimum contribution to establish a gift annuity is $25,000. Subsequent annuities may be established with $10,000.

The donor receives an immediate charitable income tax deduction for a portion of the gift. Additionally, if giving appreciated assets, the donor benefits by deferring to a later point in time a portion of the capital gains taxes that would otherwise be due if the assets were sold. The remaining portion of such capital gains taxes is forgiven entirely. Depending on the cost basis of the assets given, the donor may have the benefit of a stream of tax-free income.

**Example**

Dr. West, age 81, gives $25,000 in cash from a rollover CD to establish a gift annuity in honor of his 60th reunion. In exchange for his gift, Dr. West receives an immediate income tax deduction of about $11,300 and an annuity rate of 8.2 percent. He will receive a fixed annual income from Harvard for life, payable in equal quarterly installments, of $2,050. Of this amount, $1,500 is tax-free for eight years.

**Pooled Income Funds**

A pooled income fund operates like a mutual fund. A donor’s gift is combined with gifts from other alumni and friends, and is assigned units in an investment pool. The variable quarterly income that the beneficiary(ies) receive(s) reflects the actual earnings of the fund attributable to the units. Pooled income funds can accept cash or marketable securities that are not tax-exempt. The minimum initial gift to establish a pooled income fund account is $25,000. Additional gifts of $10,000 or more may be made at any time.

Harvard manages three pooled income funds, each with its own investment objectives:

- Harvard Life Return Fund
- Harvard Balanced Fund
- Harvard Growth Fund

**Example**

Mr. and Mrs. South, ages 61 and 60, transfer $50,000 in appreciated non-dividend-paying stock to the Harvard Balanced Fund in honor of Mr. South’s 40th reunion. They receive an immediate income tax deduction of about $22,200 and a first-year income of about $1,500. They have designated their gift for the unrestricted use of Harvard College.
Other Planning Strategies

A variety of other gift-planning strategies can minimize the donor’s income tax, gift tax, and/or estate tax, while maximizing the gift, depending on the individual’s situation.

Outright gifts
Giving appreciated assets, such as securities or real estate, can provide a double benefit by offering a current income tax deduction and allowing the donor to avoid capital gains taxes.

Donor Advised Funds
Operated similarly to a private foundation, a Harvard Donor Advised Fund (DAF) allows donors and their families to actively participate in distributing their gifts to Harvard and other charitable organizations, while centralizing asset investment and administration at the University. Gifts to the Harvard DAF will be invested in the University’s endowment. The donor(s) may recommend up to 50 percent of the income and principal to support non-Harvard charities.

Charitable lead trusts
With a charitable lead trust established by a donor, Harvard receives income from the trust for a term of years (15 to 25 years is common). At the end of the trust term, the assets of the trust typically pass to children or grandchildren. The donor is effectively “loaning” the trust amount to Harvard for a period of years and, as a result, significantly reduces his or her gift/estate taxes on the transfer of the assets of the trust to heirs. A charitable lead trust may be established at Harvard with a minimum gift of $1 million.

Legacy pledge
Classes in their 50th reunion year and beyond have the option of obtaining reunion credit for a longer-term pledge extended to the end of the donor’s life. This pledge would be paid in full through provisions in the donor’s estate plan, to the extent that it is not paid during the donor’s lifetime. With a total minimum commitment of $50,000, a donor must pay at least 20 percent of the gift within three years of the pledge, the balance of which is secured with a signed enforceable pledge agreement, and payable no later than the death of the donor and donor’s spouse (if appropriate).

Classes in their 50th reunion year and beyond will receive full credit for a Legacy Pledge.

Bequests
Bequests of all sizes are welcome and help to perpetuate a tradition that began in 1638 when John Harvard left his library and half of his estate to the then-fledgling college. While restricted bequests for scholarships, the library, faculty support, and research are welcome, estate gifts for the unrestricted use of the College, Graduate School of Arts and Sciences, or School of Engineering and Applied Sciences are the most useful.
Donors may also benefit from significant estate and income tax savings by designating Harvard as beneficiary of a life insurance policy or their qualified pension plan, such as an IRA, Keogh, 401(k), or 403(b) account.

Classes in their 55th reunion year and beyond will receive full class credit for properly documented revocable bequest intentions designated for the dean’s priorities.

Bequests and testamentary gifts of qualified pension plans intended for the ultimate use of Harvard College should be stipulated as such in the terms of the will, trust, or beneficiary designation form. The following language may be used for a general bequest to Harvard College, unrestricted as to purpose:

I give (______ dollars or ______ percent of the residue of my estate) to Harvard University, a Massachusetts educational, charitable corporation, for the benefit of Harvard College.

The information on gift planning is not offered as tax or legal advice. The examples provided are for illustration only. A donor’s deduction and interest rate may vary based on the monthly discount rate in effect at the time of the gift, the age(s) of the beneficiary(ies), and other factors. Staff members of the Office of Gift Planning are ready to consult with donors and/or advisers to plan the most advantageous gift for donors, their families, and Harvard.

Contact:
The Office of Gift Planning
Harvard University
124 Mount Auburn Street
Cambridge, MA 02138-5795

Phone: 617-496-3205
Email: ogp@harvard.edu
Web: alumni.harvard.edu/pgo
Pledge Guidelines

Reunion Pledges

Harvard’s fiscal year runs from July 1 to June 30. Reunion pledges of under $5,000, or under $1,000 for donors in their 5th reunion, are due to be paid by June 30 of that fiscal year.

Pledges of more than $5,000 are due to be paid by June 30 of the third fiscal year, including the fiscal year of the commitment. For example, a 25th reunion gift of $20,000 made in May 2012 is due to be paid by June 30, 2014. We encourage donors to make their first pledge payments in the year of their reunion. In the above example, the donor would make his/her initial pledge payment by June 30, 2012. For donors in their 5th reunion, pledges of $1,000 and above qualify for three-year payment. The Fund may extend the deadline up to five fiscal years to accommodate donor needs.

Pledge minimum: The HCF has a $10 minimum for all pledges, which is in line with the credit card minimum.

Non-Reunion Pledges

To ensure sufficient time for payment, all non-reunion pledges must be booked by June 15 and payment received by June 30 to count as a donor for that Fund year. New gifts received on or after July 1 will count toward the coming fiscal year.

Crediting of Pledges and Pledge Payments

Donors receive full credit for pledges in their reunion years and are listed at the appropriate gift level in class communications and the Harvard College Fund Annual Report of Giving. Donors making reunion pledge payments of $1,000+ are recognized as “Associates” donors in their class in the years following their reunion campaign and listed accordingly.

Example

Jane Harvard ’92 makes a pledge of $25,000 in honor of her 20th reunion at Harvard College. Jane receives full credit for her pledge, and the Class of 1992 is credited $25,000 toward its reunion total. Jane is listed as a member of the President’s Circle ($25,000 and above) in the 2011–2012 annual report and invited to the President’s Associates dinner.

In the following year, Jane makes a payment of $10,000. In recognition of this pledge payment, Jane is considered a donor in her class. She is listed in the 2012–2013 annual report at the $10,000 President’s Associates level and invited to the 2012 and 2013 President’s Associates dinner.
Ways to Make a Gift

Cash

Checks payable to Harvard College should be mailed to:
Recording Secretary’s Office
Harvard University
124 Mount Auburn Street
Cambridge, MA 02138-5795

Credit Card

Call: 1-800-VERITAS
Give online at:
alumni.harvard.edu/collegegift

Wire Transfer

For wire transfer instructions, contact the Office of the Recording Secretary at 617-495-1750.

Securities

Donors wishing to give securities should notify Harvard Management Company about the details of the gift and its purpose within Harvard and have their brokers request transfer instructions from:
Harvard Management Company
Trusts and Gifts Department
600 Atlantic Avenue
Boston, MA 02210-2203
Attention: Security Gifts
Phone: 866-845-6596
Fax: 866-457-6598

Email: security_gifts@hmc.harvard.edu

In addition, unendorsed certificates and, under separate cover, stock powers with signature only may be sent with a letter stating the purpose of the gift to Harvard Management Company.

Donors may now notify Harvard of a gift of stock online at:
alumni.harvard.edu/stockgift
Visit yardline.harvard.edu for convenient access to your solicitation assignments as well as an electronic version of this handbook and other helpful materials.

Harvard College Fund

yardline.harvard.edu
alumni.harvard.edu
Main number: 617-495-1636

Charlie Cardillo, Executive Director
617-495-4702
charlie_cardillo@harvard.edu