



Harvard College Fund

# Volunteer Handbook



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# Welcome!

Dear Harvard College Fund Volunteer,

As we embark on The Harvard Campaign for Arts and Sciences, you are partnering with Harvard at a historic moment. This is our time to ensure that Harvard continues as a place of discovery shaping the future.

Harvard College Fund volunteers are the foundation on which Harvard's success is built. The leaders of the College, the Graduate School of Arts and Sciences, and the School of Engineering and Applied Sciences are counting on us as ambassadors to champion ambitious missions, goals, and priorities. We must work together now to strengthen Harvard's teaching and learning experience for the next generation of students and faculty.

We hope you will find the enclosed resources helpful as you navigate your important volunteer role. Additional, detailed information is also available online ([alumni.harvard.edu/volunteer-resources](https://alumni.harvard.edu/volunteer-resources)) or by contacting the Harvard College Fund (617-495-1636).

Harvard is grateful for your commitment to our shared values. Together we will ensure Harvard's place as a thriving community for learning and leadership.

With deep appreciation,



**NICK SAKELLARIADIS '73 and SANDY MATEJIC EDGERLEY '84**  
Co-Chairs, Harvard College Fund Executive Committee

# Our Volunteers Set Harvard Apart

Harvard's loyal volunteer leaders are the lifeblood of the Harvard College Fund, providing guidance and support for generations. As a donor yourself, you have a unique perspective and ability to encourage peers to join you. Volunteer fundraising enables scores of promising young scholars and world-class faculty to explore, teach, learn, and create. Your time and resources change the lives of people who go on to change the world. Your hard work matters.

Thank you for investing your energy in this important process. As a volunteer for the Harvard College Fund (HCF), you are our partner in generating fundamental resources for the Faculty of Arts and Sciences (FAS), including the College, the School of Engineering and Applied Sciences (SEAS), and the Graduate School of Arts and Sciences (GSAS).

The resources secured by our volunteers are not incremental funds; every gift to Harvard's priorities makes the Harvard experience possible.

Your contributions support financial aid, curriculum development, advising, arts, athletics, residential life—these are the fundamental components that set Harvard apart.

This handbook has been designed to provide a road map across the HCF's programs and goals in coordination with The Harvard Campaign. We hope you will use this resource to help inform your efforts on behalf of the Harvard community.

## Rule of Giving

Analysis of philanthropy at Harvard and at other institutions shows a common pattern or "rule" of giving. For every 1,000 gifts, the top 10 percent account 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 have an impact on others' decisions and the final outcome of the drive. Keep in mind the tremendous impact of cumulative giving at all levels and remember that all donors are motivated by a broad showing of support.

Building a volunteer fundraising committee is a strategic process and a partnership between volunteers and HCF staff. The most powerful committees include members who encourage peer support in line with their own leadership commitments. Real success depends on proportional giving, or giving according to capacity. Participation at all levels produces significant dollars and demonstrates a shared belief in Harvard's capacity for positive impact.

## Platform for Success

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### Start early

- Ensure that anchor leadership is in place before any campaign begins.
- Solicit before, during, or after enlistment. However, setting clear gift-level expectations is essential.
- Seek advice from other seasoned volunteer leaders.
- Assemble broad, diverse, and regional representation.
- Hold regional events to build enthusiasm and momentum.

### Enlist a strong gift committee

- Lead by example, and make your own pledge early.
- Use an individual's giving potential to inspire others, and use volunteer history as a guide when considering possible leadership.

- Enlist volunteers personally.
- Be specific that you are asking volunteers to make a gift and complete solicitations.
- Assign a manageable number of solicitations to each committee member.
- Remember: Committee members seldom raise more from peers than they themselves have given.

### Bring your team together

- Attend the HCF events in Cambridge and regionally (see calendar, page 34).
- Hold meetings and review lists to identify donors and volunteers.
- Inform prospects about Harvard's fundraising priorities.
- Hold regular leadership conference calls to keep your campaign on track.
- Conduct regional receptions and dinners, with key prospects as hosts/hosting committees.

## 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.
- Keep your sights high and look for opportunities to celebrate successes at every level of giving.
- Establish specific ask amounts.
- Remember to use goals strategically throughout your effort to maximize results. For context, communicate collective HCF and Harvard Campaign goals to committee members.
- Aspire to the Century Club, which recognizes classes that raise 100 or more Associates-level gifts of \$1,000+ in a year. This goal often provides incentive for both volunteers and donors.

## Push for participation

- Recognize that participation is an important demonstration of the community's commitment to Harvard's future.
- Be creative: A combination of outreach by phone, email, social media, and student calling can help you reach your goal.
- Encourage peers to take advantage of the many opportunities to engage with Harvard through the Harvard Alumni Association.

## Communicate regularly

- Make communications short and personal.
- Celebrate the work of committee members, and thank classmates personally for their contributions.
- Contact your HCF staff liaison and visit [alumni.harvard.edu/volunteer-resources](https://alumni.harvard.edu/volunteer-resources) regularly to report solicitation progress and track important milestones. (See "CrimsonLink Volunteer Portal," page 31.)
- Ask HCF staff for anything you need.

"The launch of The Harvard Campaign offers an exciting time to connect the alumni community with the things that make Harvard exceptional. Our alma mater provides the highest-quality offering for every conceivable student. As volunteers, we are working hard to spread the word about giving to the Dean's Leadership Fund, which will provide the initial investment to catalyze and reinforce these opportunities."



SEAN CARNEY '91 AND PHIL DUFF '79  
Vice Chairs for Leadership Giving, HCF Executive Committee

# Getting Ready to Make the Ask

The success of Harvard's fundraising at every level depends on peer-to-peer outreach. Your willingness to share your personal motivation for supporting Harvard can inspire others to step up and do the same. Everyone approaches the solicitation process differently. New solicitors may welcome advice from veteran volunteers or HCF staff. To access solicitation assignments and materials and to report progress, visit [alumni.harvard.edu/volunteer/crimsonlink](https://alumni.harvard.edu/volunteer/crimsonlink), the HCF online volunteer portal. (See "CrimsonLink Volunteer Portal," page 31.)

## Participation gifts

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- These contributions require positive feelings but no close connection to the solicitor.
- A donor typically decides quickly in response to a written appeal or phone call.
- The donor completes the gift by fiscal year-end.

## Leadership gifts

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- Relationships provide important leverage.
- Several conversations may occur before a donor commits.
- For stretch commitments, the donor may fulfill a significant pledge over a five-year period.

## Tell Your Story

Your ability to articulate your own 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 or peers, don't be afraid to make the discussion personal—ask them how Harvard has affected their lives, or encourage them to share favorite memories. The connection you create should be a positive experience for both of you.

# Guidelines for Soliciting

## Plan your approach

- Think about why Harvard is important to you and what you want classmates or peers to know about why you are making a gift.
- Familiarize yourself with Harvard today by signing up to receive the daily *Harvard Gazette* email, following Harvard on Twitter, or taking a HarvardX course.
- Brush up on the background and interests of your prospects. You will receive biographical information to help align a donor's philanthropic goals with Harvard's needs.
- Don't underestimate the responsiveness and willingness to be generous. Chances are good that others feel as strongly about Harvard as you do.
- Be confident. You need not have an answer for everything; questions can help you understand an individual's special philanthropic interests.
- Use HCF staff to help develop strategy or practice a solicitation conversation.
- Use [alumni.harvard.edu/volunteer/crimsonlink](http://alumni.harvard.edu/volunteer/crimsonlink).

## Make the appointment

- Call or email your assigned prospects to arrange a convenient time to talk, either face-to-face or by phone. By arranging a time for a longer conversation, you will be able to make your case more easily.

- Be positive and upbeat. Ask for a chance to explain why you believe his or her participation is important to Harvard.

## Conduct the meeting or call

- **Be personal.** Your willingness to talk about your own gift and your decision to volunteer your time to Harvard's fundraising effort will help motivate someone to play a more substantial role.
- **Be direct.** Discuss gifts already committed. This may help raise your peer's sights. Volunteers can share a gift scale or box chart, especially when discussing pledges in the higher range. These visuals demonstrate the precedent and the need for leadership at these levels.
- **Be specific.** Use the suggested ask amount. For reunion solicitations, offer that pledges of \$5,000+ may be paid over three to five years. (Example: "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 or peer may need time to think or consult with others.
- **Inquire about matching gifts.** Ask whether a donor qualifies for a corporate matching program; larger pledges may be reasonable. Donors receive credit for both their pledge and the corporate match ([alumni.harvard.edu/ways-to-give/stocks-matching-gifts](http://alumni.harvard.edu/ways-to-give/stocks-matching-gifts)).



## Follow through

- Agree on next steps. Remember that early decisions by committee members encourage others to give generously. The gift scale tool can help demonstrate the precedent for giving at various levels.
- Send a thank-you note naming the figure pledged or proposed. This will help to move the process forward.
- Maintain contact. Many solicitations, especially at the leadership gift level, will require more than one discussion.

## After the gift

- Once the leadership gift is complete and the volunteer has secured a pledge, the gift officer will follow up to confirm terms and payment details.

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

## Acknowledgments

- Remember to send a note of thanks following each completed solicitation.
- Harvard also will acknowledge all pledges. Special situations, such as gifts of securities or real estate (see Gift Planning, page 24), will receive letters of acknowledgment with specific details about the gift.
- Committee chairs will be advised of gifts so that they can express thanks on behalf of the committee.
- Leadership donors may receive a letter of thanks from the HCF leadership, FAS dean, or University president.

## Associates Giving

Associates-level giving provides essential leadership support for the HCF across all priorities. These funds fuel innovation and groundbreaking programming. Associates donors and volunteers will be essential elements of The Harvard Campaign for Arts and Sciences, helping to raise flexible dollars that immediately benefit our current students and faculty. As with all HCF fundraising, success at this level depends upon dedicated volunteers who serve as ambassadors for Harvard every year, helping to maintain an unparalleled undergraduate experience.

Associates volunteers across all classes, the Parents Fund, and the Graduate School Fund are responsible for soliciting peers individually for gifts of \$1,000 or more to the Harvard College Fund (\$250 pre-5th reunion; \$500 pre-10th reunion). Since donors at these levels are recognized as Associates for pledges and pledge payments, volunteers can extend their outreach into reunion campaigns, encouraging classmates to make multi-year leadership commitments. In addition, these volunteer leaders contribute annually at a level that demonstrates personal leadership. For more information about Harvard College Fund giving levels, see page 33.

## **A note on Harvard's reunion and annual campaign philosophy**

The HCF discourages collaborative gifts to a scholarship, professorship, or another specific area. Designating the entire campaign gift can have a negative effect, lowering rather than raising sights. A donor who could establish a scholarship fund alone may instead give less to a group fund. The collaborative gift designation also runs counter to the Fund's long-standing mission of raising flexible gifts that can be used immediately. Flexible, or unrestricted, gifts enable the College to strengthen fundamental programs and invest wisely in promising opportunities.

In 2012, for example, the edX vision became reality through the employment of unrestricted funds. New ideas such as these are not supported by restricted endowment funds.

## **Challenges and matching funds**

The HCF encourages the strategic use of motivational tools 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 HCF officer about existing challenge funds, or discuss the possibility of creating something special to help achieve your goals.

“Broad-based participation strengthens our ties to each other and to Harvard. A gift of any size demonstrates leadership. We hope you will join us in making Harvard a part of your regular philanthropy.”



**GERALDINE ACUNA '92 AND COLBERT CANNON '97**  
Vice Chairs for Participation, HCF Executive Committee

# Reunion Campaigns

Reunion campaigns have provided the foundation for The Harvard Campaign and will continue to fuel this transformative effort. Taking place every five years as alumni plan to return to the Yard, reunion campaigns aim to inspire high levels of participation and to secure leadership contributions in support of Harvard's fundraising priorities.

## Reunion Campaign Volunteer Strategy

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Reunion campaigns follow a successful model that provides flexibility for each class and its stage of life. Younger classes differ significantly from older classes as activities, interests, understanding of philanthropy, and capacity to give evolve. For every reunion campaign, it is crucial to create an engaged and effective gift committee.

### Here's how it works:

- Co-chairs (typically the most generous, visible donors in the class) set the bar, the strategy, and the tone of the drive.
- Class leaders work together with the HCF to establish fundraising goals that align with Harvard's priorities.
- Class leaders, with HCF staff, enlist volunteers to solicit classmates. These peer conversations are an opportunity to capitalize on the unique talents, relationships, and resources of your classmates.
- Reunion campaigns follow a carefully designed calendar intended to build effective committee structures, generate momentum, and maximize fundraising results before the fiscal year-end, June 30.

### Committee formation

- Leadership enlistments: During the spring and summer of the year before the reunion, co-chairs are enlisted, then work with HCF staff to enlist vice chairs, participation chairs, and gift committee members.

- Gift committee meetings: 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). Committee meetings build involvement, commitment, and enthusiasm and provide valuable information for assigning solicitations and ask-levels. Co-chairs devise strategies for these meetings and ensure strong attendance.

### Solicitations

- HCF fundraising success depends on peer-to-peer outreach—your influence as a volunteer cannot be overstated. Before Thanksgiving, reunion campaign 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: [alumni.harvard.edu/volunteer/crimsonlink](https://alumni.harvard.edu/volunteer/crimsonlink).
- To complement your individual class activity, the committee receives regular status reports and updates from headquarters in Cambridge.

## Participation

- The participation committee will be busy with personal outreach—via phone, direct mail, email, and social media—to build awareness and engagement. Unlike co-chairs and leadership gift committee members, who have multiple points of contact with an individual to solicit larger gifts, participation volunteers focus on quantity of prospects to encourage broad support from the class.

## Harvard College Fund volunteer events

- HCF volunteer events can be supplemented by regional class gatherings to build momentum in the spring.
- The HCF holds events in New York City, Cambridge, and on the West Coast to inform volunteers and celebrate progress. Please see the calendar on page 34 and look for event invitations throughout the year.

## Conference calls

- Co-chair calls: Occur regularly (often monthly) with your HCF class officer and typically focus on status, events, classmate engagement strategies, solicitation assignments, and next steps.

- Leadership calls: It can be useful to occasionally bring together the vice chairs and the leadership gifts committee to review current assignments and potential leadership prospects, and to share best practices.
- Participation calls: Participation strategy can vary significantly by class, and conference calls can often serve to provide motivation and creative collaboration. Participation chairs should consider gathering on a call to plan broad outreach strategy, and they may consider including participation committee members for added momentum and imagination.
- All-solicitor calls: Scheduling calls for all active solicitors is recommended two to three times during a reunion campaign to share broad updates, fundraising priorities, and best practices.
- Fund-wide calls: To ensure that all reunion campaigns remain connected to Fund-wide goals and messages, volunteers are invited to join webinars hosted by the HCF Executive Committee at key points during the fundraising cycle.

## June 30

- June 30 is the common deadline for all reunion campaign gifts and pledges.

“The Harvard Campaign for Arts and Sciences and our reunion campaigns are an opportunity for us to rekindle our connection to Harvard while helping the College meet its goals. By participating, we’re not only having impact, we’re deepening and continuing our Harvard experience.”



SANJAY PATEL '83 AND JENNIFER PERINI '85  
Vice Chairs for Reunion Campaigns, HCF Executive Committee

# Reunion Campaign Committee Sample Organization



# Setting Reunion Campaign Goals

Setting an overall class goal is an important exercise. It raises sights and provides the context for what the class campaign is trying to achieve. While the process may take shape early on, the final public goal may be announced whenever it is strategically timely for your campaign. A dollar goal may be just one of your objectives. Class leaders may consider additional areas of focus, such as increasing the total number of donors at a particular level. Remember that your reunion goals will help Harvard College and the University reach ambitious campaign targets.

## Goal Setting Overview

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How does a class identify a goal that is achievable and aspirational? At the beginning of your campaign, your class officer will supply you with the 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 amounts based on what you know about 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.

### **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 14) 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 long-standing record? Or is that too much of a reach? Decide what would be the 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 goal worksheet (see page 17), build a 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 for each gift at the lower levels.

## Assessing Class Giving Potential

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This exercise (reviewing a targeted list of classmates) 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.
- Indicate your level of comfort soliciting individual classmates.

The information that you share with Harvard staff will be kept confidential and treated with the utmost discretion.

## Managing the Process

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Whether you set a goal publicly at the beginning of the campaign or decide to hold off sharing it until later, the gift scale and box chart (see page 16) can help you manage results. As you move through your campaign, this tool will help you focus on uncompleted solicitations and add or reassign important asks if necessary.

As your class campaign progresses, focus on the top of the gift scale and continue to work with undecided and unassigned prospects while also considering how to create some momentum and enthusiasm for the final push. You may try to reach a short-term goal such as securing a number of donors at a particular level of giving or organizing a participation challenge.

## Why does Harvard need philanthropic support?

At Harvard, your gift can go further. A gift to Harvard is a philanthropic investment leveraged by the size and scope of the institution and its global reach and impact. Through teaching, research, and direct services, Harvard addresses the pressing problems of the world and responds to local needs.

Giving to Harvard does not preclude other forms of philanthropy. Harvard takes great pride in the leadership and philanthropic contributions of its alumni at the local, national, and international level.

A large portion of Harvard's resources are restricted. The Faculty of Arts and Sciences seeks support to fund its vision and ambitions, not just the work of today.

For more information on The Harvard Campaign, visit [campaign.harvard.edu/fas](http://campaign.harvard.edu/fas).

Please see "Getting Ready to Make the Ask" (page 5) for additional helpful tips.

# Sample Reunion Gift Range Histories

Final results for five consecutive classes in a 25th Reunion campaign

Note that the number and size of gifts at the top level have the greatest impact on the bottom line.

Gift Range	# of Donors	Class of 1636	# of Donors	Class of 1637
\$5,000,000+				
\$3,000,000	3	\$12,000,000	2	\$8,000,000
\$2,000,000	2	\$4,000,000	2	\$4,000,000
\$1,000,000			10	\$10,000,000
	5	<b>\$16,000,000 (67%)</b>	14	<b>\$22,000,000 (76%)</b>

At the middle and lower levels, there is more similarity across classes.

\$500,000	4	\$2,000,000	1	\$500,000
\$250,000	7	\$1,750,000	9	\$2,500,000
\$100,000	14	\$1,400,000	21	\$2,100,000
	25	<b>\$5,150,000 (22%)</b>	31	<b>\$5,100,000 (18%)</b>
\$50,000	13	\$650,000	8	\$400,000
\$25,000	34	\$850,000	20	\$500,000
\$10,000	38	\$400,000	29	\$300,000
	85	<b>\$1,900,000 (8%)</b>	57	<b>\$1,200,000 (4%)</b>

<\$10,000	1,032	\$600,000	776	\$500,000
	1,032	<b>\$600,000 (3%)</b>	776	<b>\$500,000 (2%)</b>

Immediate-use subtotals are part of the overall class total.

<b>Total</b>	1,147	<b>\$23,650,000</b>	878	<b>\$28,800,000</b>
Immediate-Use				
Subtotal		<b>\$5,200,000</b>		<b>\$5,500,000</b>
Participation*		71.7%		54.9%

\*Total number of donors/class base



# of Donors	Class of 1638	# of Donors	Class of 1639	# of Donors	Class of 1640
1	\$10,000,000	1	\$5,000,000	1	\$5,000,000
3	\$12,000,000			2	\$8,000,000
2	\$2,000,000	6	\$6,000,000	3	\$3,000,000
6	<b>\$24,000,000 (77%)</b>	7	<b>\$11,000,000 (58%)</b>	6	<b>\$16,000,000 (67%)</b>
2	\$1,000,000	4	\$2,000,000	4	\$2,000,000
6	\$1,500,000	12	\$3,000,000	4	\$1,000,000
24	\$2,500,000	10	\$1,000,000	24	\$2,400,000
32	<b>\$5,000,000 (16%)</b>	26	<b>\$6,000,000 (32%)</b>	32	<b>\$5,400,000 (23%)</b>
10	\$500,000	10	\$500,000	16	\$800,000
24	\$600,000	28	\$700,000	40	\$1,000,000
34	\$350,000	30	\$300,000	20	\$200,000
68	<b>\$1,450,000 (5%)</b>	68	<b>\$1,500,000 (8%)</b>	76	<b>\$2,000,000 (8%)</b>
739	\$500,000	588	\$400,000	848	\$400,000
739	<b>\$500,000 (2%)</b>	588	<b>\$400,000 (2%)</b>	848	<b>\$400,000 (2%)</b>
845	<b>\$30,950,000</b>	689	<b>\$18,900,000</b>	962	<b>\$23,800,000</b>
	<b>\$6,400,000</b>		<b>\$5,900,000</b>		<b>\$5,800,000</b>
	52.8%		43.1%		60.1%

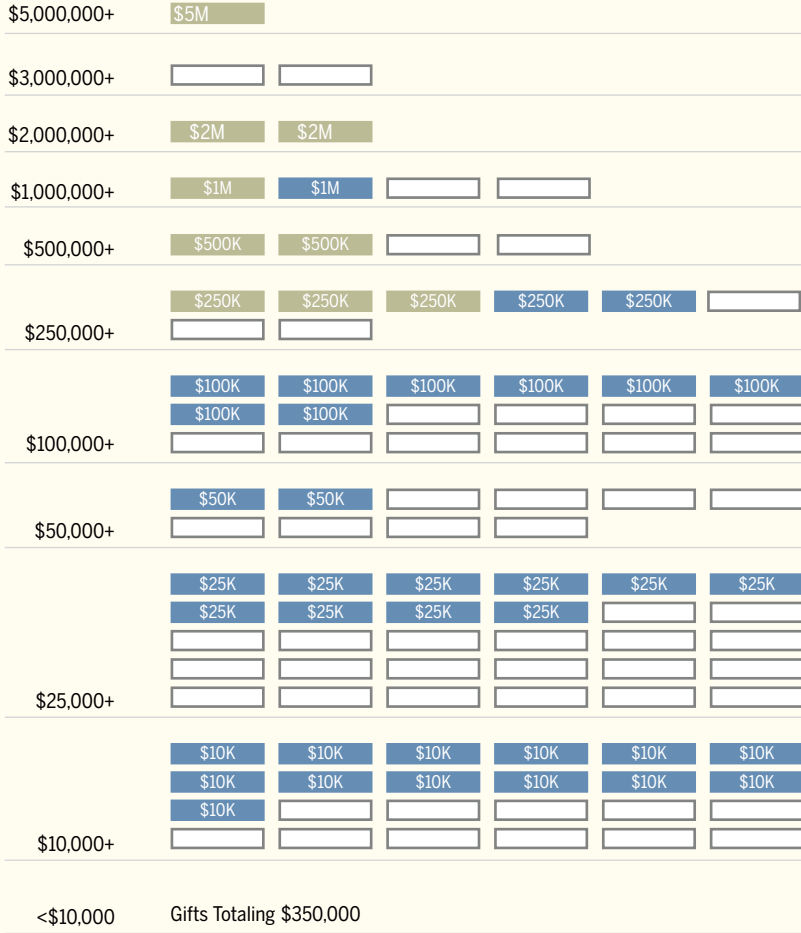
# Sample Reunion Box Chart

Overall Fundraising Total to Date: \$14,880,000  
 Overall Fundraising Goal: \$25,000,000  
 FAS Immediate-Use Total to Date: \$2,780,000  
 FAS Immediate-Use Goal: \$5,000,000

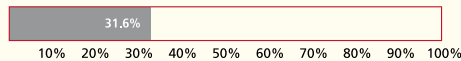
Participation to Date: 31.6% (505 Donors)  
 Participation Goal: 60% (960 Donors)

**Types of Gifts:**

Immediate-Use  
 Endowment  
 Gift Needed



**Participation**



## Sample Reunion Goal Worksheet: \$25 Million Goal

Gift Range	\$25 Million Goal		Current Progress to Goal		Additional Gifts Needed		Outstanding Asks	
\$5,000,000+*	1	\$5,000,000	1	\$5,000,000				
\$3,000,000*	2	\$6,000,000			2	\$6,000,000	8	\$24,000,000
\$2,000,000*	1	\$2,000,000	2	\$4,000,000				
\$1,000,000*	4	\$4,000,000	2	\$2,000,000	2	\$2,000,000	8	\$8,000,000
	<b>8</b>	<b>\$17,000,000</b>	<b>5</b>	<b>\$11,000,000</b>	<b>4</b>	<b>\$8,000,000</b>	<b>16</b>	<b>\$32,000,000</b>
\$500,000*	4	\$2,000,000	2	\$1,000,000	2	\$1,000,000	8	\$4,000,000
\$250,000*	8	\$2,000,000	5	\$1,250,000	3	\$750,000	12	\$3,000,000
\$100,000*	18	\$1,800,000	8	\$1,000,000	10	\$1,000,000	40	\$4,000,000
	<b>30</b>	<b>\$5,800,000</b>	<b>15</b>	<b>\$3,250,000</b>	<b>15</b>	<b>\$2,750,000</b>	<b>60</b>	<b>\$11,000,000</b>
\$50,000	10	\$500,000	2	\$100,000	8	\$400,000	24	\$1,200,000
\$25,000	30	\$750,000	10	\$250,000	20	\$500,000	30	\$750,000
\$10,000	32	\$320,000	13	\$130,000	19	\$190,000	57	\$570,000
	<b>72</b>	<b>\$1,570,000</b>	<b>25</b>	<b>\$480,000</b>	<b>47</b>	<b>\$1,090,000</b>	<b>111</b>	<b>\$2,520,000</b>
<\$10,000	850	\$630,000	460	\$350,000	390	\$280,000	MANY	
	<b>850</b>	<b>\$630,000</b>	<b>460</b>	<b>\$350,000</b>	<b>390</b>	<b>\$280,000</b>	<b>MANY</b>	
<b>Total</b>	<b>960</b>	<b>\$25,000,000</b>	<b>505</b>	<b>\$14,880,000</b>	<b>456</b>	<b>\$12,120,000</b>	<b>1000+</b>	<b>\$45,520,000</b>
Immediate-Use		\$5,000,000		\$2,780,000				

\*To achieve the expected total number of gifts at these levels, the ratio of asks to expected gifts must approximate 4:1.

# Harvard College Parents Fund

Parents are important partners for Harvard. The Parents Fund Committee is a dedicated group of volunteers who strive to build community and raise resources for today's Harvard students. Through peer-to-peer outreach, the Parents Fund Committee enhances the undergraduate experience by securing critical support for the Faculty of Arts and Sciences.

## Parents Fund Volunteer Strategy

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The Parents Fund committee must represent both alumni and non-alumni parents to ensure affinities across a broad population. Some parents may be able to draw on their personal undergraduate experience at the College, while many will be learning about the Harvard community through the eyes of their children and fellow parents. Unlike traditional alumni fundraising, the timeline for engaging parents is short, and it is important to begin organizing committee activity annually before students arrive on campus. The Parents Fund aims to connect the community of Harvard parents and enhance solicitation activity through regional events and focused on-campus programming (see calendar, page 34).

### **Make a personal connection**

Get to know your peers and your fellow volunteers. Both alumni and non-alumni parents and volunteers will have personal Harvard stories that could motivate their inclination to give and get involved. Many volunteers find it very rewarding to meet others who are sharing the Harvard parent experience.

### **Gather information**

Learn about current Harvard parents by exploring potential shared affiliations. Perhaps you are both alumni or maybe you will identify through a shared region or industry. Learning about these relationships will be critical to broadening the Harvard parent network.

### **Ask questions**

Whether you find an affinity or not, ask your parent peers about their experience—you may learn something new about today's Harvard.

### **Attend Parents Fund events**

Parents Fund volunteer strategy is driven by engagement opportunities that run in concert with Harvard's fiscal year. Regional welcome receptions take place during the summer, offering parents a chance to meet new Harvard families, while receptions recognizing Associates-level (\$1,000+) giving take place throughout the year.

## Collaborate

Many alumni parents may also be involved in their class fundraising campaigns. These efforts can be part of a Parents Fund commitment should parents choose to become involved on multiple committees. HCF staff can help guide this collaborative work.

## Communicate

Sharing information and progress, developing solicitation strategies, and coordinating collaborative outreach are critical to volunteer, donor, and overall fundraising success. Stay in close touch with your HCF Parents Fund staff partners, who will quarterback your drive from Cambridge.

## Leverage goals

Setting thoughtful and ambitious goals will provide Parents Fund volunteers and donors with the necessary context and motivation throughout the annual drive. These goals will be tied directly to HCF and Harvard Campaign goals, where immediate-use parent support will have a critical impact. Parents Fund staff will guide volunteer leaders through this important process.

“The Parents Fund makes a direct and immediate impact on the quality and vibrancy of our children’s undergraduate experience at Harvard. Participation in the Parents Fund effort offers the parent community a wonderful opportunity to help the College create and offer an incredible and exciting array of activities and options for our students.”



Helena and SJ Hwang P'13; Ashley Garrett P'16 and Alan Jones '83, P'16; and Lori and Ted '77 Samuels P'14, '13

Co-Chairs for the Harvard College Parents Fund

# Parents Fund Committee Organization

## Co-Chairs

- Support the Parents Fund with a Leadership Circle gift (\$100K+) annually
- Solicit and thank 20 to 30 families for leadership gifts of \$10K+
- Serve as the leaders of the Parents Fund Committee
- Represent the Parents Fund on the Harvard College Fund Executive Committee
- Assist in recruiting and on-boarding new volunteers to the committee
- See Vice Chairs/Regional Vice Chairs box for additional responsibilities

## Vice Chairs / Regional Vice Chairs

- Support the Parents Fund at the President's Circle level (\$50K+) annually
- Recruit new families within the region to the Leadership Committee
- Solicit and thank between 10 and 15 families for leadership-level gifts of \$10K+
- Host (or cohost) one Parents Fund event in region, if possible
- Provide feedback and advise Parents Fund staff about overall operation
- Provide support and mentorship to new volunteers within the region
- Attend Parents Fund events regionally and in Cambridge, and conference calls during the year, whenever possible
- Serve for a two-year term, renewable

## Leadership Giving Committee

- Support the Parents Fund at the Leadership Associates level (\$10K+) annually
- Solicit and thank 5 to 10 families for leadership-level gifts of \$5K+
- Attend, host, or cohost regional Parents Fund events when feasible
- Identify and recruit new volunteers
- Participate in the fall committee meeting, spring Parents Leadership Weekend in Cambridge, and occasional conference calls during the year
- Serve for a one-year term, renewable

## Associates Giving Committee

- Support the Parents Fund at the Associates level (\$1K to \$9,999) annually
- Solicit 5 to 10 families for participation and Associates-level gifts up to \$9,999
- Thank donors
- Participate in the fall committee meeting and spring Parents Leadership Weekend in Cambridge, and occasional conference calls during the year
- Attend regional Parents Fund events when feasible
- Serve for a one-year term, renewable

# Graduate School Fund

The Graduate School Fund (GSF) raises support for the Graduate School of Arts and Sciences (GSAS) by reaching out to its alumni worldwide each year. Gifts to the GSF are not invested in the endowment but used immediately to support priority areas like graduate fellowships, travel grants, student programming at Dudley House, and academic or professional development workshops. Immediate-use gifts underpin the financial commitments Harvard must make to recruit the best candidates and ensure the best graduate experience. Every gift is meaningful, and alumni generosity keeps the GSAS strong, today and tomorrow.

## Graduate School Fund Volunteer Strategy

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There are 57 degree-granting units at GSAS, cutting across many disciplines, from Slavic languages and literatures to virology, from music to business economics. The GSAS is a University-wide enterprise, and the School and its alumni are extraordinarily diverse. While they feel great pride of affiliation and wish to give back, alumni have many points of connection to Harvard, particularly to faculty in their departments, and there is no one shared experience.

### **Make a personal connection**

The diversity of the GSAS alumni community represents an opportunity to leverage many kinds of experiences, such as geographic (same city, state, or country, for example), professional (perhaps you are in a similar industry), and academic (perhaps you studied in the same program).

### **Gather information**

There is no limit to potential affiliations or connections. Many peers may be inspired to support your work by providing important information about relationships, industries, regions, or networks that may inform the GSF effort.

### Ask questions

Try to learn more about your peers' experience—it's not only effective, it's fun. Ask them how Harvard has affected their lives, or encourage them to share favorite memories or influences. 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.

### Build sustainable relationships

The Graduate School Fund depends on new and renewed annual support. Follow up with peers to build and maintain a lasting relationship that could ultimately be rewarding for you personally and for Harvard indefinitely.

Please see "Getting Ready to Make the Ask" (page 5) for additional helpful tips.

"We are proud to represent the Graduate School, which is home to some of the finest scholars in the world. Harvard graduate students have literally won Nobel Prizes for their dissertations, and they serve as a bridge between Harvard's outstanding faculty and its extraordinary undergraduates. As research assistants to faculty members, and teaching fellows and advisers to undergraduates, our graduate students play a critical role in the intellectual vitality of all that is Harvard."



Ken Froewiss '67, PhD '77; John Moon '89, PhD '94;  
Ann Bennett Spence AM '69  
Co-Chairs for the Graduate School Fund



# Graduate School Fund Committee Organization

## Co-Chairs

- Make a minimum annual contribution of \$25K
- Represent the GSF on the Harvard College Fund Executive Committee
- Solicit and thank selected donors for leadership gifts of \$10K+
- Provide feedback and advise the GSF director about overall operation
- Assist in recruiting and on-boarding volunteers
- Participate in volunteer leadership training
- Attend and/or host GSF events whenever possible
- Lead two conference calls annually
- Serve for a three-year term, renewable

## Vice Chairs / Regional Vice Chairs

- Make a minimum annual contribution of \$25K+
- Solicit 8 to 10 alumni for four- and five-figure immediate-use gifts
- Identify and recruit new volunteers
- Participate in volunteer leadership training and two annual Committee calls
- Attend and/or host GSF events whenever possible
- Lend name to appeals/marketing/ acknowledgment materials (optional)
- Serve for a three-year term, renewable

## Leadership Giving Committee

- Make a minimum annual contribution of \$10K
- Solicit 8 to 10 alumni for four- and five-figure immediate-use gifts
- Participate in volunteer leadership training and two annual Committee calls
- Attend and/or host GSF events whenever possible
- Serve as a resource for other volunteer solicitors
- Lend name to appeals/marketing/ acknowledgment materials (optional)
- Serve for a three-year term, renewable

## Associates Giving Committee

- Make a minimum annual contribution of \$1K
- Solicit six to eight alumni for four-figure immediate-use gifts
- Participate in volunteer leadership training and two annual Committee calls
- Attend and/or host GSF events whenever possible
- Serve as a resource for other volunteer solicitors
- Lend name to appeals/marketing/ acknowledgment materials (optional)
- Serve for a one-year term, renewable

# Gift Planning

Planned gifts blend a specialized knowledge of charitable tax law, estate planning, and financial planning to enable a philanthropically motivated individual to make a significant gift while receiving lifetime benefits. Gift planning, the process of making a planned gift, enables 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, and partnership interests.

Certain planned gifts, known broadly as 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 tax, gift tax, and/or estate tax, while maximizing the gift, depending on that individual's particular situation.

The Office of Gift Planning staff work closely with charitably motivated individuals and/or their advisors to tailor strategies that meet their needs and those of Harvard. An overview of several popular gift planning strategies follows.

## Life Income Plans

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Life income plans can allow a donor to make a substantial gift to Harvard and retain an income from that gift for life or for 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.

Donors receive full Harvard College Fund class credit for the face value of a life income gift designated for the dean's priorities.

These arrangements can provide benefits including:

- Income to one or two beneficiaries, for life or for 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

## Popular life income arrangements include:

### Charitable Remainder Unitrust

With the Harvard Charitable Remainder Unitrust, a donor contributes irrevocably a gift of cash, marketable securities, or other property to Harvard, as trustee of his/her 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 to the beneficiary(ies). 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/are at least 50 years old, or \$250,000 for beneficiaries between the ages of 45 and 49. If a donor transfers appreciated property, such as securities, to a unitrust, he or she avoids 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 dividends 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. They want 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 installments for the life of the beneficiary(ies), is determined by the ages and number of the beneficiaries, 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 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 \$10,600 and an annuity rate of 7.9 percent. He will receive a fixed annual income from Harvard for life, payable in equal quarterly installments, of \$1,975. Of this amount, about \$1,630 is tax free for eight years.

## Other Planning Strategies

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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 advisors to plan the most advantageous gift for donors, their families, and Harvard.

### **Gift Planning Contact:**

The Office of Gift Planning  
Harvard University  
124 Mount Auburn Street  
Cambridge, MA 02138-5795  
Phone: 617-496-3205  
Email: [ogp@harvard.edu](mailto:ogp@harvard.edu)  
Web: [alumni.harvard.edu/pgo](http://alumni.harvard.edu/pgo)

# Pledge Guidelines

## Reunion Pledges

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Harvard's fiscal year runs from July 1 to June 30. Reunion pledges of less than \$5,000 are due to be paid by June 30 of that fiscal year.

Pledges of \$5,000 and more are due to be paid within three to five years, by June 30 of the third, fourth, or fifth fiscal year, including the fiscal year of the commitment. The default due date is June 30 of the fifth fiscal year. For example, a 25th Reunion gift of \$20,000 made in May 2014 is due to be

paid by June 30, 2018. We encourage donors to make their first pledge payments in the year of their reunion. In the above example, the donor would make the initial pledge payment by June 30, 2014. 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

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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 donation for that Fund year. New gifts received on or after July 1 will count toward the next fiscal year.

## Crediting of Pledges and Pledge Payments

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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 are listed accordingly.

### *Example*

Jane Harvard '94 makes a pledge of \$50,000 in honor of her 20th Reunion at Harvard College. Jane receives full credit for her pledge, and the Class of 1994 is credited \$50,000 toward its reunion total. Jane is listed as a member of the President's Associates (\$25,000 and above) in the 2013–2014 Annual Report and invited to the President's Associates dinner.

In the following year, Jane makes a payment of \$25,000 toward her reunion pledge. In recognition of this pledge payment, Jane is considered a donor in her class. She is listed in the 2014–2015 Annual Report at the \$25,000 President's Associates level and invited to the 2015 President's Associates dinner.

## Sample Volunteer Outreach Introductions

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

Dear Name,

On behalf of our class campaign committee, I hope to have the opportunity to talk with you about a gift to Harvard on the occasion of our 25th Reunion.

I have given a great deal of thought to why I give 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,

## Thank-You Letter or Email

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Dear Name,

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 \$x. Your unrestricted gift helps keep Harvard strong by enabling it to meet significant commitments and respond to unexpected needs. You will receive confirmation and thanks from Harvard as well.

I look forward to seeing you at reunion.

Best regards,

## Associates Email Solicitation

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Dear Name,

As a member of the Associates Committee, I extend my thanks for your past support on behalf of our class and the College. As you know, Associates donors are vital to providing the unrestricted, immediate-use dollars that allow senior leaders at Harvard to think creatively and innovatively about what goes on inside and outside of the classroom. I give unrestricted resources to the College because (insert reason).

I hope you will consider joining me again this year with an Associates gift of \$1,000. I also encourage you to get involved with Harvard, either as a member of our volunteer committee or another alumni activity (if you are not already engaged). Collectively, our class can continue to make a difference for Harvard's students, faculty, and leadership, not only through our donations but through our efforts to broaden and strengthen the Harvard community.

Thank you again for your generosity and for considering sustaining your leadership support.

Best regards,

## Sample Parents Fund Solicitation Email

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Dear Name,

I am writing as a volunteer for the Harvard College Parents Fund. \_\_\_\_\_ and I recently signed on as Parents Fund Committee members. In addition to feeling good about helping Harvard, we are really enjoying getting to know the Harvard parent community at Parents Fund events.

As you may know, the Parents Fund raises unrestricted funds annually for areas of immediate need affecting the undergraduate experience at Harvard. This includes everything from advising and residential life to the arts and athletics. Each gift enables Harvard's leaders to respond in real time and with flexibility to the needs of our current students. Please take a look at some of the stories posted at [alumni.harvard.edu/volunteer-resources](http://alumni.harvard.edu/volunteer-resources). \_\_\_\_\_ and I contribute annually to the Parents Fund because (insert your reason here). It has truly been fun for us to attend more Harvard events as well as being an intrinsically rewarding experience. I would love to set up a time in the coming weeks to speak with you further about the Harvard College Parents Fund. Is there a particular time that works best for you? You can also call or email me. I look forward to hearing from you and appreciate your consideration.

Warm regards,

## Sample Graduate School Fund Solicitation Email

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Dear Name,

I am writing to you as a member of the Harvard Graduate School Fund Committee. I decided to support the Fund because (insert your reason here).

Thank you so much for your contributions in past years—your generous donations have had a real impact on Harvard graduate students. Will you consider making an Associates-level gift of \$1,000 to the Graduate School Fund for this fiscal year (ending June 30)?

Your gift is important because it provides the dean access to funds that can be put to use immediately in the areas of greatest priority. One area that depends heavily on alumni support is graduate financial aid. With our help, Harvard can continue to recruit the very best graduate students from all over the world by offering competitive fellowship packages.

I would welcome the opportunity to tell you more about the Graduate School today. Thank you for your consideration and leadership.

Best regards,



# CrimsonLink Volunteer Portal

*alumni.harvard.edu/volunteer/crimsonlink*

CrimsonLink is Harvard's online alumni volunteer solicitation portal. Peer-to-peer fundraising contributes significantly to both the number and size of gifts that we receive each year, and we hope this tool will make the peer solicitation process easier and more efficient. If you have any questions that are not answered here, please contact your officer within the Harvard College Fund or send an email to [crimsonlink@harvard.edu](mailto:crimsonlink@harvard.edu).

## How to Log In

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- Visit [alumni.harvard.edu/volunteer/crimsonlink](https://alumni.harvard.edu/volunteer/crimsonlink).
- Log in using your post.harvard ID.
- Forgot password link—<https://post.harvard.edu/olc/pub/HAA/forgot/forgot.cgi>

## Check Status on Your Assignments and Class's Progress: "View Progress" Tab

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- Classmates who appear here are your current outstanding assignments.

## Choose Classmates to Contact: "Choose Prospects" Tab

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- Defaults to entire class. Use the search and filter functions to narrow the list.
- Checking the LYBUNT box will show all classmates who gave last year.
- Checking the SYBUNT box will show all classmates who gave at least once in the past five years but not last year.
- Classmates may be "grayed" out for various reasons: currently assigned to another volunteer, already made a gift this year, or is a volunteer.

## Contact Your Classmates About Making a Gift: “Make Your Asks” Tab

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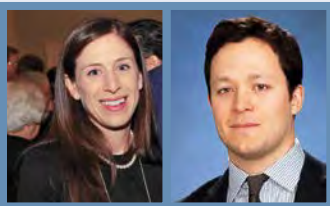
- Click on a name to view contact information and giving histories.
- Click on “Enter Pledge” to record a pledge. (Note: Solicitation stage will automatically change to “Complete.”)
- To edit contact information (address, email, or phone), click on the pencil icon.
- Enter comments to track solicitation progress (e.g., “Left voicemail on 10.22.12” or “Follow up in the spring”).

## Volunteer Resources: Quick Links (Within the “Make Your Asks” Tab and “Prospect Details” Page)

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- Get Started (a step-by-step guide to making a solicitation)
- Resource Library (talking points on Harvard’s fundraising priorities)
- Email Templates
- Phone Scripts
- Link to Online Giving Form

“Recent graduate volunteers serve as important resources to one another and have a special opportunity to impact the role that Harvard plays in the lives of their classmates. We are inspired by the creative energies in our committed young alumni leaders and impressed with the strong fundraising results achieved through shared momentum.”



**ERICA MITNICK KLEIN '00 AND MATT MITCHELL '01**  
Vice Chairs for Recent Graduates, HCF Executive Committee

# Harvard College Fund Giving Levels

GIFT LEVEL	GIFT TYPE	RECOGNITION
< \$1,000	All	1636 Society membership, which honors donors who make an annual gift or pledge payment of any amount for five or more consecutive years: <ul style="list-style-type: none"> <li>■ Welcome letter and certificate</li> <li>■ Listing on the 1636 Society website</li> <li>■ List of faculty-recommended books</li> </ul>
\$1,000–\$2,499 Associates	All	<ul style="list-style-type: none"> <li>■ Listing in the Harvard College Fund Annual Report of Giving</li> <li>■ Communications with special access to the latest news on campus</li> </ul>
\$2,500–\$4,999 Charter Associates	All	In addition to the above... <ul style="list-style-type: none"> <li>■ Narrative report from a faculty member or administrator providing a greater insight into campus life</li> </ul>
\$5,000–\$9,999 Crimson Associates	All	In addition to the above... <ul style="list-style-type: none"> <li>■ Webcast with faculty member or administrator highlighting a priority on campus</li> <li>■ Invitations to regional events, where offered</li> </ul>
\$10,000–\$24,999 Leadership Associates	All	In addition to the above... <ul style="list-style-type: none"> <li>■ Book, with a Harvard bookplate, written by a Harvard faculty member for first gift of \$10,000 or more</li> <li>■ Invitation to a Leadership program during HCF Assembly (Cambridge)</li> <li>■ Invitation to a Leadership dinner at Harvard College ReConnect (West Coast)</li> </ul>
\$25,000–\$49,999 President’s Associates	All	In addition to the above... <ul style="list-style-type: none"> <li>■ Tie or scarf for first gift of \$25,000 or more</li> <li>■ Invitation to the President’s Associates Dinner</li> <li>■ General impact update tailored to priority giving area</li> </ul>
\$50,000 and above	Immediate-use unrestricted	In addition to the above... <ul style="list-style-type: none"> <li>■ Membership in the Harvard Yard Society</li> <li>■ Name on annual donor wall in University Hall</li> <li>■ Invitation to Harvard Yard Society annual dinner</li> </ul>

Recognition is customized and commensurate to gift level and designation for gifts of \$100,000 or more.

## Harvard College Fund Volunteer Activity 2013–2014

	JULY–SEPTEMBER	OCTOBER–DECEMBER	JANUARY–MARCH	APRIL–JUNE
ALL HCF VOLUNTEERS	Ongoing prospect identification, individual solicitations, and committee engagement			
		FAS Campaign Launch, Cambridge (October)	Winter Summit, New York City (TBD)	Return to Harvard Day, Cambridge (April)
		Harvard-Yale Participation Challenge and Pub Night, Cambridge (November)	All-Volunteer CrimsonLink training webinar (February)	Annual Meeting and Luncheon for Volunteer Leaders, Cambridge (May)
		Harvard-Yale Football Game, New Haven (November)	Recent Graduate Volunteer Leadership Breakfast, New York City (TBD)	Harvard Commencement, Cambridge (May)
			Recent Graduate Volunteer Leadership Reception, New York City (March)	HCF/HAA Volunteer Thank You Reception, Cambridge (May)
			Harvard College ReConnect, West Coast TBD (March)	Volunteer Voices Regional Events, locations and dates TBD
HCF EXECUTIVE COMMITTEE	Conference Call (September)	Fall Meeting, Cambridge (October)	Winter Meeting, New York City (TBD)	Spring Meeting, Cambridge (TBD)
REUNION CAMPAIGNS	Spring/Summer: Leadership recruitment begins and a kick-off event could officially launch your reunion effort	Volunteers may host regional events to continue to build momentum throughout the year		
	Fund-wide Reunion Campaign Leadership webinar (September)	Fund-wide Reunion Campaign Leadership webinar (December)		Fund-wide Reunion Campaign Leadership webinar (April)
	Leadership enlistments continue	Solicitation assignment distribution	Solicitation activity continues	Solicitation activity continues with participation push towards Reunion weekend
	Regional Campaign Committee meetings begin (September)	Regional Campaign Committee meetings continue (October-November)	Class-based committee calls may help mobilize strategy	
ASSOCIATES GIVING	Associates leadership/committee enlistments and solicitation assignment distribution may continue throughout the year	Fund-wide Associates Leadership webinar (October)	Regional Associates receptions	Fund-wide Associates Leadership webinar (April)
		President's Associates Dinner, New York City (November)		Regional Associates Receptions
PARENTS FUND	Focus on leadership prospect identification and new volunteer recruitment			
	Ongoing receptions and luncheons for Harvard College Parents regionally in the United States and abroad			
	Committee members host regional receptions for incoming freshman families (July/August)	Freshman Parents Weekend: Parents Fund Freshman Parent Reception and Brunch, Cambridge (October)	Junior Parents Weekend: Parents Fund Junior Parent Reception (February)	Parents Leadership Weekend, Cambridge (April)
	Move-in Day, University Alumni Reception, and Non-Alumni Parents Dinner, Cambridge (August)	Committee meeting	Committee Conference Call	Parents Leadership Reception, New York City (TBD)
Committee Conference Call (September)				
GRADUATE SCHOOL FUND		Committee Kickoff conference call (October)	GSAS January Alumni Programs, Cambridge (January)	GSAS Alumni Departmental Reunion, Cambridge (April)
		Leadership Dinner with Dean Meng, location TBD (October)	GSF Leadership Dinner with Dean Meng, location TBD (February)	GSF Alumni Day, Cambridge (April)
				GSF Committee Conference Call (May)
WEST COAST COUNCIL	Meeting, San Francisco (September)		Host West Coast Council Meeting, San Francisco (March)	Host West Coast Council Conference Call (June)
HCF APPEALS SCHEDULE	"Crimson Callers" Student Calling Program (September-May)			
	Mailed Appeal (August)	Mailed Appeal (October)	Mailed Appeal (February)	2 Mailed Appeals (April, May)
	Email Appeal (September)	3 Email Appeals (November, mid-December, late December)	4 Email Appeals (January, mid-February, late February, March)	Email Participation Campaign (April)
	Harvard-Yale Challenge		3 Email Appeals (May, mid-June, late June)	

“We rely on Associates Giving as a cornerstone of leadership support for the Harvard College Fund. Whether you’re stretching to make your first Associates gift or it’s something that you do every year, there is a real sense of camaraderie among this generous community of donors whose support bolsters Dean Mike Smith’s highest priorities.”



**KEN BARTELS '73 AND ERYN BINGLE '95**

Vice Chairs for Associates Giving, HCF Executive Committee

# Glossary of Key Terms

## Donor Loyalty:

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**LYBUNT:**

Classmate gave last year but not this year

**X Year Donor:**

'X' is a number that denotes the number of consecutive years your classmate has given to the College

**SYBUNT:**

Classmate gave at least once in the past five years but not last year

**LAPSED:**

More than five years have passed since your classmate's last gift

**Non-Donor:**

Classmate has never contributed to the College

## Solicitation Stage:

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**Assigned/Cleared for Solicitation:**

Starting point (assignment made but no contact initiated yet)

**Solicitation in Progress:**

Initial contact has been made

**Complete:**

Pledged/made a gift

**Declined:**

Refused solicitation

**No Response:**

Volunteer reached out to peer numerous times but was never able to reach him/her (should be used only at the end of the fiscal year)

HI



## Harvard College Fund

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

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