VOLUNTEER HANDBOOK
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WELCOME!

Dear Harvard College Fund Volunteer,

Thank you for partnering with us at this historic moment. With the launch of The Harvard Campaign for Arts and Sciences in October 2013, the Faculty of Arts and Sciences is positioned to lead a revolution in teaching, learning, and research. This is our time to ensure that Harvard continues as a place of discovery for people leading positive change in the world.

Harvard College Fund volunteers are the foundation upon which Harvard’s fundraising 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 to champion ambitious priorities. All gifts for your reunion or annual campaign—including class, Graduate School Fund, and Parents Fund drives—have an impact on the overall Campaign. You are an integral ambassador, encouraging broad support and engaging the worldwide community to strengthen Harvard’s teaching and learning experience for future generations of students and faculty.

We hope that you will find the enclosed resources helpful as you navigate your important volunteer role. Additional details are available online (alumni.harvard.edu/volunteer-resources) or by contacting the Harvard College Fund (617-495-1636).

We are grateful for your commitment.

MIKE KERR ’81 AND SANDY MATEJIC EDGERLEY ’84
CO-CHAIRS, HARVARD COLLEGE FUND EXECUTIVE COMMITTEE
THE HARVARD CAMPAIGN FOR ARTS AND SCIENCES

The following six Campaign priorities provide a framework for our ambitions in the coming years. Each priority is an essential component in providing an unparalleled undergraduate and graduate education for the 21st century. For more information on these priorities, news of the Campaign, and additional volunteer resources, please visit campaign.harvard.edu/fas.

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

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

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

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

House Renewal and the Student Experience
The Houses are among Harvard’s most important learning places, where undergraduates, graduate students, and faculty live, work, and learn together.

School of Engineering and Applied Sciences (SEAS)
Harvard is rethinking and dramatically expanding the place of engineering in higher education and reimagining the role of engineers in society.

BUILDING A VOLUNTEER FUNDRAISING COMMITTEE
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
Start early
- Ensure that anchor leadership is in place before any campaign begins.
- Lead by example, and make your own pledge early.
- Remember the rule of giving: 90 percent of the total dollars will come from 10 percent of the donors. Engage and cultivate this group early.
- Solicit before, during, or after enlistment, while setting clear gift-level expectations up front.
- Seek advice from other seasoned volunteer leaders.
- Enlist a strong gift committee with broad, diverse, and regional representation.
- Hold regional events to build enthusiasm and consider key hosts/hosting committee members as a useful means of engagement.

Set fundraising goals with care
- Use an individual’s giving potential to inspire others, and use volunteer history as a guide when considering possible leadership.
- Ask your volunteers to make a gift and complete their solicitations.
- Assign a manageable number of solicitations to each committee member.
- Remember: Committee members seldom raise more from peers than they themselves have given.
- Review lists with your team to identify donors and volunteers, and hold regular calls to keep your campaign on track.
- Inform peers about Harvard’s fundraising priorities.

Why Make a Gift to Harvard?
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 levels.

A large portion of Harvard’s resources are restricted. The Faculty of Arts and Sciences seeks support to fund not only the work of today, but also our vision and ambitions for the future.

THE IMPORTANCE OF VOLUNTEER LEADERSHIP
Harvard’s loyal volunteer leaders are the lifeblood of the Harvard College Fund (HCF). As an alumni and/or parent volunteer, you are our partner in generating fundamental resources for the Faculty of Arts and Sciences (FAS).

Your hard work matters. You have a unique perspective and ability to encourage peers to join you as a donor. The resources secured by our volunteers are not incremental funds; every gift to Campaign priorities makes the Harvard experience possible. Your contributions support financial aid, curriculum development, advising, arts, athletics, and residential life. Thank you for investing your energy, time, and resources.

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GETTING READY TO MAKE THE ASK

Harvard’s fundraising 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, and new solicitors may welcome advice from veteran volunteers or HCF staff. To access solicitation assignments and materials and to report progress, visit HCF’s online volunteer tool: alumni.harvard.edu/volunteer/crimsonlink. (See “CrimsonLink Volunteer Portal,” page 31.)

PARTICIPATION GIFTS

• 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

• Relationships provide important leverage.
• Several conversations may occur before a donor commits.
• The donor may fulfill a significant pledge over a five-year period.

Push for participation

• Lead with engagement, inviting peers to participate as a member of the Harvard community.
• 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.
• Communicate regularly with short and personal outreach.
• Celebrate the work of committee members and thank peers personally for their contributions.
• Contact your HCF staff liaison and visit alumni.harvard.edu/volunteer/crimsonlink.
• Aspire to the Century Club, which recognizes classes that raise 100 or more Associates-level gifts of $1,000+ in a year.

Encourage Broad Engagement with Harvard

Strengthening the Harvard community bolsters philanthropic participation over time. A strong dollar total is only one of several metrics we will use to evaluate our success in the Campaign. Overall alumni engagement, beyond giving, is also critically important. HCF and the Harvard Alumni Association (HAA) both benefit when fundraising volunteers champion the broad array of engagement opportunities beyond making a gift.

We encourage you to take part in HAA activities and offerings and to become more familiar with Harvard today. Sign up to receive the daily Harvard Gazette email, follow Harvard on Twitter and on Facebook (harvard.edu/social-media), or take a HarvardX for Alumni course. Please share these resources with your peers and encourage them to become engaged in the same way.

—The Harvard Campaign for Arts and Sciences is an exciting time to share what makes Harvard exceptional. Volunteers help to spread the word that gifts to the Dean’s Leadership Fund provide the initial investment to catalyze and reinforce the highest-quality experiences for every student.
GUIDELINES FOR SOLICITING

Plan your approach
- Think about why Harvard is important to you and what you want peers to know about why you give.
- Increase your engagement with Harvard today and encourage your peers to do the same (see “Encourage Broad Engagement with Harvard,” page 4).
- 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 your peers’ 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.

Make the appointment
- Call or email 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 gift and your decision to volunteer your time to Harvard’s fundraising efforts will help motivate someone to play a more substantial role.
- Be direct. Discuss gifts already committed. This may help raise your peers’ 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 and parent 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 peers may need time to think or consult with others.
- Inquire about matching gifts. Ask whether a donor qualifies for a corporate matching program (alumni.harvard.edu/ways-to-give/stocks-matching-gifts). Donors receive credit for their pledge and the corporate match.

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 (see “Sample Reunion Gift Range Histories,” pages 16–17).
- 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 a 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 and periodic pledge reminders from Harvard. 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 will also acknowledge all pledges. Donors of different kinds of gifts, such as gifts of securities or real estate (see “Gift Planning,” page 26), 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 HCF leadership, the FAS dean, or the University president.

Tell Your Story
When thinking about how to tell your story, consider what Harvard means to you and why you choose to dedicate 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 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.
ASSOCIATES GIVING

Associates-level giving provides essential leadership support for the Harvard College Fund across all priorities. These funds fuel innovation and groundbreaking programming. Associates donors and volunteers provide key resources for Campaign priorities, helping to raise flexible funds that immediately benefit our current students and faculty.

Be specific
“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.”

“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.”

Be personal
“I give unrestricted resources to the College because ________.”

“We contribute annually to the Parents Fund because ________. It has truly been fun for us to attend more Harvard events, as well as being an intrinsically rewarding experience.”

“It was wonderful to reconnect with you and to talk about our time at Harvard.”

Include an amount
“I hope you will consider joining me again this year with an Associates gift of $1,000.”

“We are truly grateful for your pledge of $X.”

Say thank you
“As a member of the ________ Committee, I extend my thanks for your past support on behalf of the College.”

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

“Thank you again for your very generous response to my call regarding our reunion gift.”

For sample scripts and emails, please visit CrimsonLink or contact your HCF officer.

Volunteer impact
As with all HCF fundraising, support at the Associates level depends upon volunteers who serve as ambassadors for Harvard every year, helping to maintain an unparalleled student 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).

Donors at these levels are recognized as Associates for pledges and pledge payments, and volunteers can encourage multiyear leadership commitments at key inflection points, such as a reunion campaign or to celebrate a child’s graduation from the College.

In addition, these volunteer leaders contribute annually at a level that demonstrates personal leadership (see “Harvard College Fund Giving Levels,” pages 32–33).
REUNION CAMPAIGNS

Reunion campaigns are at the epicenter of The Harvard Campaign for Arts and Sciences and will continue to fuel this transformative effort. Taking place every five years, 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

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 (see “Recent Graduates Philosophy,” page 25). For every reunion campaign, it is crucial to create an engaged and effective gift committee.

Gift committee roles
- Co-chairs (typically the most generous, visible donors in the class) set the bar, the strategy, and the tone of the drive.
- The steering committee includes critical volunteer leaders at all levels of the gift scale who inform strategy and motivate volunteers throughout the class campaign.
- Class leaders work together with HCF to establish 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 on June 30.

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

Solicitations
- HCF fundraising success depends on peer-to-peer outreach.
- In the fall, 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.
- To complement your individual class activity, the committee receives regular status updates from Cambridge.

Participation
- The participation committee focuses on status, events, classmate engagement, and peer conversations are an opportunity to capitalize on the unique talents, relationships, and resources of your classmates.

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, in Cambridge, and on the West Coast to inform volunteers and celebrate progress. (See “Harvard College Fund Volunteer Activity,” pages 34–36.)

Conference calls
- Co-chair or steering committee calls: Calls with your HCF class officer occur regularly (often monthly) and typically focus on status, events, classmate engagement strategies, solicitation assignments, and next steps.
- Leadership solicitor calls: Vice chairs and the leadership gifts committee will review current assignments and potential leadership prospects and will share best practices.
- Participation calls: Participation strategy can vary 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 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.
- Fund-wide calls: To ensure that all reunion campaigns remain connected to HCF goals and messages, volunteers are invited to join webinars hosted by the HCF Executive Committee at key points during the year.

Deadline
- The end of the fiscal year, June 30, is the common deadline for all reunion gifts and pledges.

—Reunion campaigns are opportunities to rekindle alumni connections to Harvard while helping the College meet its goals. Through participation, alumni have an impact and deepen their Harvard experience.

JOHN MOON ’89, PHD ’94; JENNIFER PERINI ’85
VICE CHAIRS FOR REUNION CAMPAIGNS
REUNION CAMPAIGN COMMITTEE ORGANIZATION
ALL COMMITTEE MEMBERS MAKE A PROPORTIONALLY APPROPRIATE CONTRIBUTION THAT EXEMPLIFIES PERSONAL LEADERSHIP.

STEERING COMMITTEE

CO-CHAIRS

- Establish the overall fundraising strategy for the class
- Help identify, solicit, and enlist members to the reunion campaign committee
- Host, attend, and preside at meetings and events
- Oversee committee activity and guide regular class communications
- Communicate Harvard’s priorities, mission, and goals to the class
- Emphasize committee solicitation completion

VICE CHAIRS, LEADERSHIP GIFT CHAIRS, AND ASSOCIATES CHAIRS

- Help organize committee activity on a regional or thematic basis
- Represent class leadership by attending events and meetings whenever possible
- Help identify and personally solicit leadership gift prospects
- Communicate Harvard’s priorities, mission, and goals to the class

PARTICIPATION CHAIRS

- Organize participation activity to focus on broad participation goals
- Attend class meetings and events whenever possible
- Communicate Harvard’s priorities, mission, and goals to the class through broad personal solicitation outreach

JOHN HARVARD SOCIETY CHAIRS

- Have included FAS in estate plans and serve as advocates for estate giving
- Recognize and help steward classmates who have included FAS in estate plans
- Attend biennial meeting of class bequest chairs

COMMITTEE MEMBERSHIP

LEADERSHIP GIFTS COMMITTEE AND ASSOCIATES COMMITTEE

- Attend class meetings and events, whenever possible
- Communicate Harvard’s priorities, mission, and goals through individual solicitations
- Share personal motivations for supporting Harvard and becoming involved
- Leadership Gift volunteers typically focus on gifts of $10,000+ while Associates volunteers encourage gifts of $1,000+ (levels adjusted for recent graduates)

PARTICIPATION COMMITTEE

- Make calls/send emails
- Communicate Harvard’s priorities, mission, and goals to the class through broad personal solicitation outreach
- Encourage broad engagement with the Harvard community solicitation outreach

GIFT PLANNING ADVOCATES

- Articulate personal motivations for making a planned gift
- Encourage classmates to explore gift planning opportunities
- Attend class events and author strategic appeals
SETTING REUNION CAMPAIGN GOALS

Setting an overall class goal is an important exercise. It raises sights and provides context for the class campaign. While the process may take shape early on, the final public goal may be announced at a strategic time during 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 reach ambitious Campaign targets.

Getting started
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” (see 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.

Review your own prior reunion results
As a class matures, its own track record may inform the next reunion goal 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 at all levels 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 “Sample Reunion Goal Worksheet,” page 19), 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
The exercise of 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 HCF staff will be kept confidential and treated with the utmost discretion.

Managing the process
Whether you set a goal publicly at the beginning of the campaign or decide to hold off until later, the gift scale and box chart (see “Sample Reunion Box Chart,” page 18) can help you manage results. As you move through your campaign, these tools will help you focus on uncompleted solicitations and add or reassign important asks if necessary.

As your class campaign progresses, 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.

—Recent graduate volunteers serve as an important resource for one another and have a special opportunity to enlarge the role that Harvard plays in the lives of their classmates. Young alumni leaders are very creative and achieve strong fundraising results through shared momentum.
## SAMPLE REUNION GIFT RANGE HISTORIES
### FINAL RESULTS FOR FIVE CONSECUTIVE CLASSES IN A 25TH REUNION CAMPAIGN

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<th>Number of Donors</th>
<th>Class of 1637</th>
<th>Number of Donors</th>
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<td>1,147</td>
<td>$23,050,000</td>
<td>873</td>
<td>$28,800,000</td>
<td>846</td>
<td>$30,950,000</td>
<td>689</td>
<td>$18,900,000</td>
<td>962</td>
<td>$23,800,000</td>
</tr>
</tbody>
</table>

**Dean's Leadership Fund Subtotal**: $5,200,000

**Participation**: 71.7%

*Total number of donors/class base

---

*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.

Dean's Leadership Fund subtotals are part of the overall class total.
## SAMPLE REUNION BOX CHART

<table>
<thead>
<tr>
<th>Gift Range</th>
<th>$5,000,000+</th>
<th>$3,000,000+</th>
<th>$2,000,000+</th>
<th>$1,000,000+</th>
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<th>$50,000+</th>
<th>$25,000+</th>
<th>$10,000+</th>
<th>&lt;$10,000+</th>
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<tr>
<td>$5,000,000+</td>
<td>$5M</td>
<td></td>
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<td></td>
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<td>GIFTS TOTALING $350,000</td>
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<td></td>
<td></td>
<td></td>
<td>$10K</td>
<td></td>
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</table>

## SAMPLE REUNION GOAL WORKSHEET: $25 MILLION GOAL

<table>
<thead>
<tr>
<th>Gift Range</th>
<th>$25 Million Goal</th>
<th>Current Progress to Goal</th>
<th>Additional Gifts Needed</th>
<th>Outstanding Ask</th>
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</thead>
<tbody>
<tr>
<td>$5,000,000+</td>
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<td>$5,000,000</td>
<td>1</td>
</tr>
<tr>
<td>$3,000,000</td>
<td>$6,000,000</td>
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<td>$6,000,000</td>
<td>8</td>
</tr>
<tr>
<td>$2,000,000</td>
<td>$2,000,000</td>
<td>2</td>
<td>$4,000,000</td>
<td>8</td>
</tr>
<tr>
<td>$1,000,000</td>
<td>$4,000,000</td>
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<td>$2,000,000</td>
<td>8</td>
</tr>
<tr>
<td>$500,000</td>
<td>$1,000,000</td>
<td>2</td>
<td>$1,000,000</td>
<td>8</td>
</tr>
<tr>
<td>$250,000</td>
<td>$1,250,000</td>
<td>3</td>
<td>$750,000</td>
<td>12</td>
</tr>
<tr>
<td>$100,000</td>
<td>$1,800,000</td>
<td>18</td>
<td>$1,800,000</td>
<td>10</td>
</tr>
<tr>
<td>$50,000</td>
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<td>2</td>
<td>$100,000</td>
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<td>$25,000</td>
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<td>$250,000</td>
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<tr>
<td>&lt;$10,000</td>
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<td>460</td>
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<td>Dean's Leadership Fund</td>
<td>$5,000,000</td>
<td></td>
<td>$2,780,000</td>
<td>1,000+</td>
</tr>
</tbody>
</table>

Overall Fundraising Total to Date: $14,880,000
Overall Fundraising Goal: $25,000,000
Dean's Leadership Fund Total to Date: $2,780,000
Dean's Leadership Fund Goal: $5,000,000

Participation to Date: 31.6% (505 Donors)
Participation Goal: 60% (960 Donors)
Types of Gifts:
- Dean's Leadership Fund
- Restricted
- Gift Needed
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 FAS.

PARENTS FUND VOLUNTEER STRATEGY

The Parents Fund Committee represents both alumni and non-alumni parents, raising Associates-level gifts (see page 9) while ensuring and growing 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 “Harvard College Fund Volunteer Activity,” pages 34-36.)

Make a personal connection

Get to know your peers and your fellow volunteers. Each family 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 share the Harvard parent experience.

Gather information

Learn about current Harvard parents by exploring potential shared affiliations. Perhaps you are both alumni of the same institution, or maybe you will identify through a shared region or industry.

Learning about these relationships is critical to broadening the Harvard parent network.

Ask questions

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

Host or attend Parents Fund events

Parents Fund volunteer strategy is driven by engagement opportunities that run in concert with Harvard’s fiscal year.

Welcome receptions take place regionally during the summer and fall, offering parents a chance to meet new Harvard families.

Receptions recognizing Associates-level ($1,000+) giving take place throughout the year, including Parents Leadership Weekend, the Parents Fund flagship event that is held in Cambridge in the spring.

We encourage you to use these events as meaningful touchpoints to help build or strengthen your relationships with your parent prospects.

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 Parents Fund staff, who will support your campaign efforts 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 goals, through which parent support for the Dean’s Leadership Fund will have a critical impact. Parents Fund staff will guide volunteer leaders through this important process.

HELENA AND SJ HWANG P’17, ’13; ASHLEY GARRETT AND ALAN JONES ’83, P’16; ADAM AND JAN WATEROUS P’18, ’14
CO-CHAIRS FOR THE HARVARD COLLEGE PARENTS FUND

—The Parents Fund has a direct and immediate impact on the quality and vibrancy of the undergraduate experience at Harvard. Participation in the Parents Fund gives parents a wonderful opportunity to help the College offer students an exciting array of activities and options.
PARENTS FUND COMMITTEE ORGANIZATION

- Support the Parents Fund at the Leadership Circle level (>$100K+) annually
- Help build relationships between Harvard parents and the College
- Solicit and thank families for leadership-level gifts
- Represent the Parents Fund on the Harvard College Fund Executive Committee
- Host one Parents Fund event annually

CO-CHAIRS

- Provide feedback to and advise the Parents Fund director
- Assist in recruiting and on-boarding new volunteers
- Attend and preside at meetings and events
- Serve for a two-year term

REGIONAL VICE CHAIRS

- Support the Parents Fund at the President’s Circle level (>$50K+) annually
- Help build relationships between Harvard parents and the College
- Solicit and thank families for leadership-level gifts
- Recruit new families within the region to the committee
- Host (or cohost) one regional Parents Fund event, if possible
- Provide feedback to and advise the Parents Fund director about strategy and operation
- Provide support and mentorship to new volunteers within the region
- Attend events and meetings regionally and in Cambridge, whenever possible
- Serve for a two-year term (renewable)

LEADERSHIP COUNCIL

- Support the Parents Fund at the Leadership Associates level ($10K+) annually
- Help build relationships between Harvard parents and the College
- Solicit and thank families for Associates and leadership-level gifts
- Attend, host, or cohost regional Parents Fund events, when feasible
- Identify and recruit new volunteers
- Participate in committee meeting/calls and attend Parents Leadership Weekend in Cambridge
- Serve for a one-year term (renewable)

ASSOCIATES COMMITTEE

- Support the Parents Fund at the Associates level (>$1K) annually
- Help build relationships between Harvard parents and the College
- Solicit and thank families for participation and Associates-level gifts
- Participate in committee meetings/calls and attend Parents Leadership Weekend in Cambridge
- 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 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. These gifts underpin the financial commitments Harvard must make to recruit the best candidates and ensure an unparalleled graduate student experience.

GRADUATE SCHOOL FUND VOLUNTEER STRATEGY

GSAS offers 57 degree-granting units, cutting across many disciplines, from Slavic languages and literatures, to virology, to music, to business economics. While housed within FAS, GSAS is a University-wide enterprise, and the School and its alumni are extraordinarily diverse. Alumni have many points of connection to Harvard, particularly to faculty in their departments, and there is no single experience.

Make a personal connection
The diversity of the GSAS alumni community represents an opportunity to leverage many kinds of affiliations, such as geography, industry, or academics.

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 or networks.

Ask questions
Try to learn more about your peers’ experiences. Ask them how Harvard has affected their lives, or encourage them to share favorite memories or influences.

Build sustainable relationships
GSAS depends on new and renewed annual support. Follow up with peers to build and maintain lasting relationships that could ultimately be rewarding for you and for Harvard indefinitely. See “Getting Ready to Make the Ask” (page 5) for additional tips.

—Harvard graduate students serve as a bridge between Harvard faculty and undergraduates. As research assistants to faculty members, and as teaching fellows and advisors to undergraduates, graduate students play a critical role in Harvard’s intellectual vitality.
GRADUATE SCHOOL FUND COMMITTEE ORGANIZATION

**CO-CHAIRS**
- Make a minimum annual contribution of $25K
- Represent 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 eight to ten 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 COUNCIL**
- Make a minimum annual contribution of $10K
- Solicit eight to ten 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 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)

ADDITIONAL CONSIDERATIONS

Volunteers should keep the following philanthropic guidelines in mind when talking with peers. We encourage you to reach out to HCF staff with any questions on these strategies.

**CHALLENGES AND MATCHING FUNDS**
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 challenge funds or discuss the possibility of creating something special to help achieve your goals.

**POOLED GIFTS**
HCF discourages pooled gifts to a scholarship, professorship, or another specific area. Designating the entire class 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. A collaborative gift also runs counter to HCF’s long-standing mission of raising flexible gifts that can be used immediately (Dean’s Leadership Fund).

Unrestricted gifts such as these enable the College to strengthen fundamental programs and invest wisely in promising opportunities.

In 2012, for example, the HarvardX vision became reality through the employment of unrestricted funds. Restricted endowment funds cannot support new ideas such as this.

**RECENT GRADUATES PHILOSOPHY**
As your peers begin their alumni relationship with Harvard, begin your conversations with a discussion about philanthropy in general and as it relates to Harvard. For many, this will be their first opportunity to consider what philanthropy means to them.

Encourage classmates to become involved at whatever level feels most comfortable. Resources may be scarce while some continue their education and begin careers. It is critical that each peer is offered an opportunity to engage at a proportionally appropriate level.

You and your peers can become engaged through volunteering, signing up to receive the daily Harvard Gazette email, following Harvard on Twitter or on Facebook, or taking a HarvardX for Alumni course. Ask HCF or HAA staff for additional opportunities.
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.

PLANNED GIVING OPTIONS

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

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 HCF 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

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 beneficiaries. 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 beneficiaries who 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.

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.

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 beneficiaries, is determined by the age and number of 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 additional gifts of $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 true power of gift planning is in structuring gifts so that they are good for the donor and also good for Harvard. Donors partner with Harvard by giving in a way that is both effective and appropriate for their circumstances.
OTHER GIFT 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 tax.

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 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 reducing 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 the 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, GSAS, or SEAS 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 (or Graduate School of Arts and Sciences or Harvard School of Engineering and Applied Sciences).

The information on gift planning is not offered as tax or legal advice. This example is provided 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 of the beneficiaries, 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.

Contact:
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 less than $5,000 are due to be paid by June 30 of that fiscal year. Pledges of $5,000 or 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. HCF may extend the deadline up to five fiscal years to accommodate donor needs.

HCF has a $10 minimum payment 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 must be received by June 30 to count as a donation for that fiscal year.

New gifts received on or after July 1 will count toward the next 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 are listed accordingly.

Example:
Jane Harvard ’95 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 1995 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 2014–2015 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 2015–2016 annual report at the $25,000 President’s Associates level and invited to the President’s Associates Dinner.

CRIMSONLINK VOLUNTEER PORTAL

alumni.harvard.edu/volunteer/crimsonlink

Peer-to-peer fundraising contributes significantly to both the number and size of gifts that HCF receives each year. CrimsonLink, Harvard’s online volunteer solicitation portal, should make the peer solicitation process easier and more efficient. If you have any questions, please contact your HCF officer or send an email to crimsonlink@harvard.edu.

HOW TO LOG IN
- Visit alumni.harvard.edu/volunteer/crimsonlink
- Log in using your post.harvard ID
- Forgot password link—post.harvard.edu/olc/pub/HAA/forgot/forgot.cgi

CHECK STATUS ON YOUR ASSIGNMENTS AND OVERALL PROGRESS:
“VIEW PROGRESS” TAB
- Peers who appear here are your current outstanding assignments

CHOOSE CLASSMATES OR PARENTS TO CONTACT: “CHOOSE PROSPECTS”
- Defaults to entire class—use the search and filter functions to narrow the list
- Checking the LYBUNT box will show all classmats who gave last year, but not this year
- Checking the SYBUNT box will show all classmates who gave at least once in the past five years but not last year
- Names 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”
- 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 10.22.14” or “Follow up in the spring”)

VOLUNTEER RESOURCES: QUICK LINKS
(WITHIN THE “MAKE YOUR ASKS” TAB AND “PROSPECT DETAILS” PAGE)
- 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
### HARVARD COLLEGE FUND GIVING LEVELS

<table>
<thead>
<tr>
<th>GIFT LEVEL</th>
<th>GIFT TYPE</th>
<th>RECOGNITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$1,000</td>
<td>ALL</td>
<td>1636 Society membership, which honors donors who make an annual gift or pledge payment of any amount for two or more consecutive years:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Welcome letter and certificate</td>
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<td></td>
<td></td>
<td>• Listing on the 1636 Society website</td>
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<tr>
<td></td>
<td></td>
<td>• List of faculty-recommended books</td>
</tr>
<tr>
<td>$1,000–$2,499</td>
<td>ALL</td>
<td>In addition to the above:</td>
</tr>
<tr>
<td>ASSOCIATES</td>
<td></td>
<td>• Listing in the Harvard College Fund Annual Report of Giving</td>
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<td></td>
<td></td>
<td>• Communications with special access to the latest news on campus</td>
</tr>
<tr>
<td>$2,500–$4,999</td>
<td>ALL</td>
<td>In addition to the above:</td>
</tr>
<tr>
<td>CHARTER ASSOCIATES</td>
<td></td>
<td>• Narrative report from a faculty member or administrator providing a greater insight into campus life</td>
</tr>
<tr>
<td>$5,000–$9,999</td>
<td>ALL</td>
<td>In addition to the above:</td>
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<tr>
<td>CRIMSON ASSOCIATES</td>
<td></td>
<td>• Invitations to regional events, where offered</td>
</tr>
<tr>
<td>$10,000–$24,999</td>
<td>ALL</td>
<td>In addition to the above:</td>
</tr>
<tr>
<td>LEADERSHIP ASSOCIATES</td>
<td></td>
<td>• Book, with a Harvard bookplate, written by a Harvard faculty member for first gift of $10,000 to $24,999</td>
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<td></td>
<td></td>
<td>• Invitation to a leadership program during Assembly (Cambridge)</td>
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<tr>
<td></td>
<td></td>
<td>• Invitation to a leadership dinner at ReConnect (West Coast)</td>
</tr>
<tr>
<td>$25,000 AND ABOVE</td>
<td>ALL</td>
<td>In addition to the above:</td>
</tr>
<tr>
<td>PRESIDENT’S ASSOCIATES</td>
<td></td>
<td>• Tie or scarf for first gift of $25,000 or more</td>
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<tr>
<td></td>
<td></td>
<td>• Invitation to the President’s Associates Dinner</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• General impact update tailored to priority giving area</td>
</tr>
<tr>
<td>$50,000 AND ABOVE</td>
<td>DEAN’S LEADERSHIP FUND</td>
<td>In addition to the above:</td>
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<tr>
<td></td>
<td></td>
<td>• Membership in the Harvard Yard Society</td>
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<tr>
<td></td>
<td></td>
<td>• Name on annual donor wall in University Hall</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Invitation to Harvard Yard Society annual dinner</td>
</tr>
</tbody>
</table>

Recognition is customized and commensurate to gift level and designation for gifts of $100,000 or more. Gift levels for recent graduates are adjusted. A gift qualifies for Associates level at $250 (pre-5th Reunion) or $500 (pre-10th Reunion).
<table>
<thead>
<tr>
<th>QUARTER 1</th>
<th>QUARTER 2</th>
<th>QUARTER 3</th>
<th>QUARTER 4</th>
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</thead>
<tbody>
<tr>
<td><strong>ALL HCF VOLUNTEERS</strong></td>
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<tr>
<td>Fall Reunions, Cambridge (Classes 4s and 9s)</td>
<td>Harvard-Yale Football Game, Cambridge</td>
<td>Winter Summit, New York City</td>
<td>Annual Meeting and Luncheon for Volunteer Leaders, Cambridge</td>
</tr>
<tr>
<td>Leadership Recruitment begins and a kickoff event could officially launch your reunion effort</td>
<td>Leadership Recruitment continues</td>
<td>Solicitation activity continues</td>
<td>Solicitation activity continues</td>
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<tr>
<td><strong>HCF EXECUTIVE COMMITTEE</strong></td>
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<tr>
<td>Fall Meeting, Cambridge</td>
<td>Winter Meeting, New York City</td>
<td>Spring Meeting, Cambridge</td>
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<tr>
<td>Spring/Summer: Leadership recruitment begins and a kickoff event could officially launch your reunion effort</td>
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<tr>
<td><strong>REUNION CAMPAIGNS</strong></td>
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<tr>
<td>Fund-wide Reunion Campaign webinar</td>
<td>Fund-wide Reunion Campaign webinar</td>
<td>Fund-wide Reunion Campaign webinar</td>
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<tr>
<td>Leadership Recruitment continues</td>
<td>Solicitation assignment distribution</td>
<td>Solicitation activity continues</td>
<td>Solicitation activity continues</td>
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<tr>
<td>Regional Campaign Committee meetings begin</td>
<td>Regional Campaign Committee meetings continue</td>
<td>Class-based committee calls may help mobilize strategy</td>
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<tr>
<td><strong>ASSOCIATES GIVING</strong></td>
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<tr>
<td>Associates leadership/committee enrollment and solicitation assignment distribution may continue throughout the year</td>
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<tr>
<td><strong>REUNION AND ANNUAL PARTICIPATION</strong></td>
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<td><strong>PARENTS FUND</strong></td>
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<tr>
<td>Move-in Day, University Alumni Receptions, and Non-Alumni Parents Dinner, Cambridge</td>
<td>Committee Meeting, Cambridge or NYC</td>
<td>Winter Conference Call</td>
<td>Parents Leadership Reception, New York City</td>
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<tr>
<td>Fall conference call</td>
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<tr>
<td><strong>GRADUATE SCHOOL FUND</strong></td>
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<td></td>
<td>Committee Kickoff conference call</td>
<td>GSAS January Alumni Programs, Cambridge</td>
<td>GSAS Alumni Departmental Reunion, Cambridge</td>
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<td>GSF Alumni Day, Cambridge</td>
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<td>GSF Committee Conference Call</td>
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<tr>
<td><strong>WEST COAST COUNCIL</strong></td>
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<tr>
<td>Fall Meeting, San Francisco</td>
<td>Winter Meeting, San Francisco</td>
<td>Spring Council Conference Call</td>
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<td><strong>HCF APPEALS SCHEDULE</strong></td>
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<tr>
<td><strong>ONLINE RESOURCES</strong></td>
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<tr>
<td><strong>FOCUS ON LEADERSHIP, PROSPECT IDENTIFICATION AND NEW VOLUNTEER RECRUITMENT</strong></td>
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<tr>
<td><strong>ONGOING RECEPTIONS AND LUNCHEONS FOR辭ARVARD COLLEGE PARENTS REGIONALLY IN THE UNITED STATES AND ABROAD</strong></td>
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<td><strong>ONLINE RESOURCES</strong></td>
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<td><strong>CRIMSON CALLERS STUDENT CALLING PROGRAM</strong></td>
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</tbody>
</table>
GLOSSARY OF KEY TERMS

DONOR LOYALTY

LYBUNT: Donor gave last year but not this year

X Year Donor: 
X is a number that denotes the number of consecutive years your peer 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

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)

THANK YOU!