

2018 – 2019 Reunion Giving Workshop PowerPoint Notes

Slide 1

Welcome to the University of Virginia Reunion Giving Committee PowerPoint. Thank you for volunteering your time, talent, and knowledge of your class to assist us with your Reunion. And thank you for supporting the University with your past philanthropic support. We hope this training will be informative and beneficial to you and the committee.

Slide 2

Before we begin, I want to make you aware of the [University Reunion Giving staff](#) who will be assisting Reunion classes in meeting their goals this year.

[Beth Bishop](#) is the director of Reunion Giving. She oversees the Reunion Giving team, and works directly with the classes of 1959, 1964, 1969, and 1979.

[Frasher Bolton](#) is an Assistant Director, who works with the classes of 1974, 1994, 1999, and 2014

[Margaret Fisher](#) is an Assistant Director, who works with the classes of 1984, 1989, 2004, and 2009

Additionally, **Andrea Benelli** serves the team as our Development Associate, and **Jacob Durham** functions as our Development Coordinator/Data Analyst.

We are in the process of hiring two additional Assistant Directors by the end of 2018, so be advised that class assignments may change and additional Reunion Giving officers may be communicating with your class as the fiscal year progresses. But feel at ease knowing that each class will get expert advice and knowledge from the team in a timely manner.

Slide 3

Let's get started by looking at an overview of the Reunion Program Structure.

[The Reunion Program](#) has two arms: the Networking Committee and the Giving Committee. Networking is managed by the Alumni Association, housed in Alumni Hall. Giving is managed by University Advancement, housed at the Fontaine Research Park.

The Networking Committee plans Reunions Weekend events, and encourages class attendance.

The Giving Committee encourages classmates to give back to the University in honor of their reunion.

There are some alumni who are serving on both committees. You may hear these alumni referred to as Dual committee members.

Slide 4

Why should you and your classmates financially support UVA? Here are a few talking points we highlight throughout the year in our solicitations, that we encourage you to use as well.

Your participation in fundraising efforts sends a message of support for the University and conveys satisfaction with your undergraduate experience. Any gift, large or small, is a vote of confidence in UVA, and a metric carefully monitored both internally and externally of the University.

Most alumni, when asked, think that the average giving participation rate at UVA is in the 30%-60% range.

Our current rate is... 19%.

The main external groups paying attention to our giving percentage are college ranking organizations such as The Princeton Review, US News and World Report, and The Wall Street Journal. This year UVA Ranked 25th among all schools nationally, and [ranked #3 for top public Universities](#). Our overall alumni participation rate is 19%, whereas our peer private institutions—Princeton, Notre Dame, Duke, and Stanford—boast alumni participation rates that exceed 35%.

U.S. News & World Report considers alumni giving a prime indicator of satisfaction among graduates of a schools.

Additionally, you may have heard us referred to as a “privately funded public university”, and that really is the case. The University receives far less state funding per student than most of its public peers. In the last fiscal year, State support for the Academic Division operating budget was 8.5%. When factoring in the Medical Center and the College at Wise, we received less than 5% of our total funding from the commonwealth.

Finally, your support helps us advance three major initiatives that are part of the [Strategic Plan](#) of the University:

[Faculty Recruitment](#)

I'm sure you remember a professor that profoundly changed your perspective on life. Hundreds of tenured professors will be retiring in the next 3-5 years. We need resources to retain our top professors and to recruit the next generation of faculty who will challenge the minds of UVA Students for the next several decades.

[Scholarships](#)

The University is committed to providing today's students with the same memorable experience that you had while you were on Grounds. We want to remove the obstacles that prevent the best and the brightest students from receiving a UVA education. As such, we guarantee families that we will meet 100% of their student's demonstrated need through loans, grants and scholarships.

The Rotunda and the Academical Village

These are working buildings in need of a full renovation and repair. The Rotunda renovation was completed last year, and our next area of focus will be the Range and Lawn rooms and the Academical Village as a whole.

Slide 5

Importance of Giving Committee

You might be asking why do we need a Giving Committee?

We need YOUR help to engage your class! You know your classmates and have those strong relationships. With your help and encouragement, you can get them to come back and give back!

You serve as the liaison for all the Reunion Giving program, and can help spread the word to bring classmates back to Grounds and promote significant giving from your class in this Reunion year.

Significant giving can mean different things to different people: to a donor, it may mean an increased gift, a multi-year pledge, a planned gift or future use gift, or even a major gift that gets documented this year. For those who haven't given in a while, a participation gift is a significant gift that can help your class and the University meet their ambitious giving participation goals.

So be sure to reach out to as many alumni from your class as possible, and invite them to Come Back to Grounds for Reunions, and to Give Back, in any way, to UVA.

Slide 6

Let's look a little closer at the role of a volunteer. I hope this will help set clear expectations and answer any questions you have about volunteering. We ask you to:

1. [Make a gift to the University in your reunion year.](#) We ask all of our volunteers to document their gifts by December 31, 2018. You need to set an example for the classmates you are contacting about giving back.
2. [Help us recruit additional members to your Reunion Giving committee throughout the year.](#)
3. Stay informed of Reunion updates and other outreach from our office and from Alumni Hall
4. Reach out to classmates using [UVA Volunteers in Action](#), our online volunteer management system, to ask classmates to come back to Reunions Weekend and give back to the University.
5. If possible, [attend your Reunions Weekend](#). Be sure to mark your calendar today!
May 30-June 2, 2019 (60th - 35th) Classes of 1959-1984 and TJ Society
June 7-9, 2019 (30th- 5th) Classes 1989-2014
6. Have Fun! After all, this is your weekend, and we want you to enjoy it as much as the rest of your class.

Slide 7

Ways to grow the Committee

On this slide you will see some of the most popular University programs, first-year dorms, student organizations, and other affinity groups in which your classmates may have been involved. To maximize the effectiveness of the committee, you should attempt to have one person from each of the major affinity groups from your time on Grounds. Be thinking about popular organizations, whether a member is already on the committee, and who you might be able to recruit as a representative of that group.

Slide 8

What Counts as a reunion gift?

Gifts of any type, made to any area of the University, between July 1, 2018 – June 30, 2019 will count toward your Class's Reunion goals.

This includes annual giving, endowed and capital gifts, pledges, gifts made through wills, trusts and estates, and employer matching gifts.

Gifts to any area of the University count in Reunion, including but not limited to:

- All Undergraduate Schools and graduate schools (Darden, Law, Medical, etc.)
- Jeffersonian Grounds, scholarships, Faculty support
- Health System
- Athletics
- All Student Activities

Two quick notes: University tuition does not count towards Reunion giving. Sorry current parents! Additionally, membership fees, such as Alumni Association Lifetime Membership dues and Fralin Museum of Art memberships, also do not count as gifts to the University

There is **no class specific gift** to one particular area or project. All donors may designate their gift wherever they wish. Gifts can be designated to more than one area.

Five year pledges: Pledges initiated within the fiscal year will count as a whole toward the class goal. For example, \$1,000/year x 5 years = \$5,000 toward the class goal. Five-year pledges will be pivotal in helping us reach our goal. We would like every committee member to make a five-year pledge to the University, and encourage all of your classmates to do the same.

Ways to Make a Gift

- Gifts can be made online or through the mail using our printable pledge forms. All giving forms can be found on the Reunion Giving website, www.virginia.edu/reuniongiving
- Automatic payment schedules can be set-up. This can allow people to make monthly gifts over five years in manageable amounts.

- **If you document a planned gift – will, trusts, and estates – in today’s dollars, the total will count toward the class goals. Many of your classmates may have already done this, but have just not notified the University.**
- Have appreciated stock? Stock transfer instructions can be found on page **21** of the training manual.
- Employer matching gifts will count toward the class totals once all documentation is complete.

Slide 9

Documenting Your Own Gift

We’d like to have **committee member gifts documented by Dec 31st**. This not only helps us in tracking the progress towards your class goal, but it makes you a more credible solicitor when you have your gift into the University before you ask your classmates to do the same.

[Support areas that are meaningful to you](#)

You are welcome to give to anywhere at the University! If there are multiple places you would like to support, work with your Giving Officer to make the process easier for you.

We encourage you to think strategically about making a big impact and challenging yourself to increase your giving amount this year. If you aren’t sure of your giving history, contact your Reunion Giving Officer for more information.

[Five year pledges](#)

I hope you will make a five-year pledge and encourage your classmates to do the same.

Consider making a recurring gift on your credit card. A Netflix subscription is hardly noticeable each month, but adds up after 5 years. Your grand total will count toward our goals.

[Matching Gifts:](#)

Do you know if your employer has a matching gift program? If you have questions, check with your HR department or let us know and we can help you figure it out.

Slide 10

Scholarships

Currently, scholarships are the #1 institutional priority at UVA.

Over 30% of students are awarded some level of need-based aid.

UVA was recently ranked the #2 “best value” among public national universities, according to the 2018 US News and world report rankings.

[The Bicentennial Scholars Fund](#) is a great way to contribute funds to help current and future students realize the benefits of a UVA education. This year, the Bicentennial Scholarships Fund has

a great matching opportunity for new donors. If you or a classmate are interested in giving to scholarships, let your Reunion Giving Officer know, and they will provide you with additional information and connect you with an officer from the Scholarships team.

Slide 11

Volunteer Resources

There are many different resources in place to help make reaching out to your classmates easier.

Online you can find the [Volunteer Resource Page](#)- this is found on our UVA Reunion Giving website, and has communications templates, information, frequently asked questions, pledge form, giving priorities across grounds and helpful links for you to use and share.

The [Volunteer Training Manual](#), that you received either electronically or by mail, is also very helpful! It has all the information about Reunions and Reunions Weekend, how to give, where to give, follow up suggestions, and much more! Feel free to read it during the year to refresh your memory, or reference it if you have any questions.

The [Volunteers in Action database](#) (referred to as VIA) is the database that you will use to see everyone in your class. It is a secure online volunteer management system that will allow you to search for and select classmates to contact about coming back for Reunions and making their gift. The system is designed to be a one stop shop for class outreach. And, if you send an email to a classmates, the responses come back to you only. So, if you receive a change of address, new phone number, or any other new information, be sure to send it to your Reunion Officer.

Slide 12

Volunteers in Action Database

I encourage you to [log into VIA](#) as soon as possible and take a more in depth look at the database since this is the system we will encourage you to use at multiple times throughout this year.

Within the system you will be able to search for and claim classmates by geographic location, undergraduate school, or any affiliation they were involved in while at UVA.

VIA contains classmate contact information and customizable templates for emails, solicitations, letters, phone calls and thank you messages. You will have the ability to send emails directly through the system. When someone makes a gift, it will also be noted in the system and we hope that you will then follow up with a thank you to that person.

We suggest each volunteer claim between 10-20 classmates for outreach to encourage them to come back and give back. When claiming classmates, please be honest with yourself and how much you are able to take on in regards to reaching out. We will be following up with you during the year to continue to reach out to those who have not made a gift, and we encourage you to keep your portfolio at a manageable size.

You should have already received your login credentials and password for the system, along with a link to a much more thorough training video specifically for VIA. Note that you will have to click and sign a confidentiality agreement before you are fully able to access the database. Also, if you change your password, we will not have that information if you forget it but we can reset it again for you! If you need help, please contact our office, and we will walk you through any troubles.

Slide 13

Reaching out to Classmates

As a volunteer, we ask you to reach out to 10-20 classmates throughout your reunion year. These can be classmates from your school, a student organization, your current city, or your closest friends.

Again, we ask that you sign into VIA and claim the classmates you will contact. This curbs members of your class receiving multiple outreach from several members of the class. Also, VIA will allow you to see if a classmate has made a gift, but will not contain specific dollar information.

Now let's walk through the Solicitation Process

- After you've claimed your classmates, check VIA to see if they've made a gift this fiscal year. You can also check the donor honor roll on your Classes website for this information.
- Tell the classmate about your role as a Giving committee member, and explain your class goals, if they are unfamiliar.
- Ask your classmates to give a gift of any amount to the areas at the University that are meaningful to them.
- You will receive an email reminder before each contact period. At that time, the seasonally correct email, phone call, and letter templates will be available in VIA. You will also be provided with social media posts that you are encouraged to use.

Slide 14

How Often Should I Reach Out?

- Committee members are asked to reach out to their classmates 3-4 times during the year. We ask that you reach out to your classmates sometime during the contact periods highlighted in orange. You will see that the contact dates coincide with mail and email solicitations from the reunions team.
- The important dates to know, are:
 - October 2
 - February 5
 - April 9
- Try to reach out to your classmates within two weeks of each contact period start date. If your classmate makes a gift, be sure to thank them! There is no need to continue contacting them. You can reach out to classmates directly from VIA by email, or by phone, text message, or even a mailed letter, if you prefer. Sometimes it's helpful to email and then follow up a week later with a phone call or text message.

Slide 15

During your outreach, please take into consideration:

There are 11 distinct Schools and approx. 27 Foundations at UVA, each making many different touch points throughout the year. Within Advancement we try to communicate with each other in regards to mailings, communications schedules, and solicitations, it is possible to contact a classmate shortly after they have received a communication from the University. If they are bothered by your call, apologize and ask when a better time might be to reach out to them.

If you or a classmate have a question about a major gift, a non-traditional gift, or anything unfamiliar to you, feel free to [direct all Giving Questions to your class's Reunion Giving Officer](#) for answers and assistance.

Slide 16

When you have completed a contact with a classmate

- Be sure to log your communication into the VIA database
- Be sure to update your Reunion Giving officer with your progress and results.
- Please remember to keep conversations confidential. Making a charitable gift is a personal decision and may involve discussion of a classmate's financial situation. It is essential that we treat sensitive information with respect.
- Once your claims make a gift, please take a few moments to send a thank you note or email – VIA will contain a thank you template.

Slide 17

Thank you again for taking time to complete this volunteer training webinar. Your next steps as a volunteer are as follows:

- [Please log into VIA and begin claiming your classmates](#)
- Reach out to your classmates throughout the year, in particular at the start of a new contact period.
- [Contact your Reunion Giving officer by December 31, 2018 to document your pledge.](#)

Be sure to reach out to your Reunion Giving officer if you have any questions or concerns, or need additional information. We are here to assist you!

Thank you in advance for your hard work and service to the University. We look forward to working with you throughout this Reunion year to make it the best ever! Go Hoos!