VOLUNTEER HANDBOOK

THE ST. OLAF FUND
Fiscal Year 2017
ST. OLAF FUND

Volunteer Handbook

Fiscal Year 2017

Thank you for serving as a volunteer for the St. Olaf Fund! In this role, you will work with other volunteers from your class to increase awareness and support for the St. Olaf Fund. This handbook contains a variety of information about the St. Olaf Fund, the impact of giving, and your role as a volunteer. Please contact us at 800-733-6523 or fund@stolaf.edu if you have questions at any time.

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ABOUT THE ST. OLAFFUND

The St. Olaf Fund provides flexible operating support to help bridge the gap between collected tuition and related fees and the actual cost of educating St. Olaf students. More than 12,000 donors, including around 8,000 alumni, generously participate, and collectively have driven the St. Olaf Fund to provide up to $4.7 million annually for operations, or 27% more gifts since 2011.

Why give?
St. Olaf College continues to be distinctive as a liberal arts college where students receive a rigorous education and experience community on a residential campus. As the newly revised mission statement states:

*St. Olaf College challenges students to excel in the liberal arts, examine faith and values, and explore meaningful vocation in an inclusive, globally engaged community nourished by Lutheran tradition.* (Approved May 2016)

Income from tuition and room and board covers about 70 percent of the college’s operating budget. By increasing annual giving, we can increase operational funding for the academic programs, residential community, and off-campus activities, which provide the margin of excellence that defines the St. Olaf experience.

Areas of Emphasis: The St. Olaf Fund supports three areas of emphasis through gifts to current priorities and designated gifts.

- **Financial Aid** – St. Olaf is committed to meeting 100 percent of demonstrated financial need of every student.
- **Academic Programs** – high quality classroom education, as well as opportunities for research and experiential learning.
- **Campus Life** – the St. Olaf experience extends to the campus green, the cafeteria, and the residence halls.

Where do gifts go?
Donors can choose to support St. Olaf’s general operations or direct their annual gift to priorities such as academic programs, athletics, financial aid, campus enhancements, or student life. Gifts are available for spending the following year, easing departmental budgeting.

There are a few types of gifts that do not count toward the St. Olaf Fund. These include:

- Gifts to capital projects
- Gifts to endowed funds
- Unpaid multi-year or one-time pledges
All in for the Hill is the St. Olaf Fund’s 24-hour day of giving. Started in 2015, this one-day online event brings together the entire St. Olaf community on campus and around the world to raise support for the St. Olaf Fund through matching funds, giving challenges, social media, and peer to peer connections. In 2015 an unprecedented 2,282 donors made a gift in one day, many of them young alumni (28%) and former donors (25%). Volunteers help build awareness for the event through peer to peer solicitations and social media outreach.

Why volunteer?
The St. Olaf Fund works to build a culture of philanthropy on campus and among our alumni community. Volunteers are a crucial part of this culture. Alumni support and shape the college across generations. Alumni engagement and giving are signs of confidence in the impact of a St. Olaf education. Participation rates are often an important factor when the college applies for grants and affects our national college rankings.

Donor Recognition

The St. Olaf Fund Loyalty Society honors donors who make a gift to the St. Olaf Fund for three or more consecutive years. More than 7,000 alumni, parents, and friends are recognized as members.

The St. Olaf Fund Leadership Circle, a new affinity group to be launched in 2016, will honor donors who give annually at the $2,500 level and above; currently 500 donors give at this level, and their gifts comprise 50% of the Fund overall.

Manitou Heights Society recognizes donors who establish a planned gift to St. Olaf.
THE 2016-2017 ST. OLAF FUND BOARD

The St. Olaf Fund Board
The St. Olaf Fund Board helps direct the vision and work of the St. Olaf Fund and is a resource for you!

Each representative works with five classes of volunteers, in the half decade around their own year of graduation. Use your board member as a resource when you have questions or concerns, and watch for information and updates from them throughout the year.

Classes of 1950-1954:
Duane Engstrom ’53
eduaneng@earthlink.net 507-664-9406

Classes of 1955-1959:
Sonja Wold Salveson ’60
sonjasalveson@gmail.com 612-209-5065

Classes of 1960-1964:
John Hegg ’63
johnhegg@sio.midco.net 605-376-2895

Classes of 1965-1969:
Paul Egeland ’65
pmegeeland@aol.com 952-240-3322

Classes of 1970-1974:
Camilla Madson ’72
madsoncr@gmail.com 952-926-4216

Classes of 1975-1979: VACANT

Classes of 1980-1984:
Julie Wrase ’82
jwrase@comcast.net 651-483-2913

Classes of 1985-1989:
Beth Horsager ’85
horsager@mac.com 612-781-2883

Classes of 1990-1994:
Catherine Wierz ’90
catherinevierz@comcast.net 630-406-0833

Classes of 1995-1999:
Carolyn Major ’98
cmajor01@yahoo.com 763-551-1135

Classes of 2000-2004:
Adam Wilhelm ’03, Chair
adam.m.wilhelm@gmail.com 773-343-3633

Classes of 2005-2009:
Siri Peterson Baker ’09
siri.peterson.baker@gmail.com 651-399-5904

Classes of 2010-2014:
Clayton Smith ’10, Vice-Chair
claytonsmit@gmail.com 612-323-4128

Classes of 2015-Present: VACANT
IMPACT

What does it mean that all gifts make an impact? If 100 donors gave $100, their combined gifts would support 16 bus trips for Ole athletic teams or academic programs, five student internships, or nearly half of a student’s demonstrated financial need.

**Academics** – The St. Olaf Fund helps support conference costs, lending textbooks, academic enrichment, and other special needs. For example, the Art Department subsidized a fifth-year emerging artist program that provides graduates studio space to build their portfolio and prepare gallery showings of their work. Great Conversation students also could attend film nights and cultural trips supporting classroom learning.

**Financial aid** – Nearly 90% of students receive financial aid, and receive on average $26,890 in support. The St. Olaf Fund provides $1.8 million in aid.

**Athletics** – One-quarter of students participate directly in club and varsity athletics, requiring frequent travel to practice and game venues. The St. Olaf Fund helps provide chartered buses to safely transport coaches and teams, and also student fans as part of Ole Pride days to boost school spirit for Ole athletics.

“Before coaches often drove multiple 12-passenger vans to shuttle teams to games and meets. Using St. Olaf Fund dollars, we can secure safer chartered travel, providing coaches more time with their athletes, and students a fun way to support their fellow Oles together.”

—Ryan Bowles, Athletic Director

**Music** – Following the U.S. embargo lift, in 2016 the Cuban Ministry of Culture invited the St. Olaf Jazz Ensemble to perform a series of March concerts— the first in Cuba by any St. Olaf music group. This amazing though unexpected opportunity required quick preparation – instrument cases were needed to safely transport instruments. With flexible support of the St. Olaf Fund, the Music department purchased new cases for both groups in the same year.

“We were delighted we could cover the cost – all our instruments came safely back, and our students had wonderful life-changing experiences learning from musicians and sharing their talent with the world.”

—Alison Feldt, Music Department Chair
**BEING A CLASS FUND AGENT**

St. Olaf Fund volunteers serve as part of a class fundraising team, sharing the responsibility of keeping in touch with fellow classmates and asking them to support the college annually through gifts to the St. Olaf Fund.

**Class Fund Agent Expectations**
1. LEAD by example. Make a gift to the St. Olaf Fund before asking classmates to give.
2. CONNECT with at least 15 to 20 classmates.
3. ADVOCATE for All in for the Hill.
4. THANK classmates for their gifts and support.
5. STAY INFORMED about news from the Hill through monthly volunteer newsletters.

**Recruiting Volunteers**
You are an ambassador for St. Olaf to your class. We are grateful for all you do! We want you to have as much support as possible in your work, which includes growing your team of Class Fund Agents.

Here are a few tips for recruiting. If you would like additional support, contact your St. Olaf Fund staff.
1. Think about why you volunteer with the St. Olaf Fund.
2. Identify prospective volunteers. St. Olaf Fund staff can help identify prospects and provide contact information.
3. Reach out to potential volunteers. Find a time to talk over the phone or in person.
4. Thank your classmate for their support and engagement and ask if they would be interested in supporting the college as a volunteer.
5. If they are interested, connect the new volunteer with St. Olaf Fund staff for the year’s timeline and training materials.

**Fiscal Year 2017 Volunteer Calendar**
- **September 2016:** Fall appeal from St. Olaf Fund
- **October 3 and October 8, 2016:** Volunteer Kick-Offs
- **Tuesday, October 11-Tuesday, October 25, 2016:** Fall Blitz
- **Tuesday, October 25, 2016:** All in for the Hill
- **November 2016:** Thank you notes for Fall Blitz and All in for the Hill
- **November-December 2016:** Calendar year-end appeal from St. Olaf Fund
- **January-February 2017:** Spring class letter writing and editing
- **March 2017:** Spring class letters mailed from St. Olaf Fund
- **March 4, 2017:** St. Olaf Black and Gold Gala
- **March 28-April 12, 2017:** CFA Spring Blitz (CFAs only)
- **April-May 2017:** Fiscal Year End appeal from St. Olaf Fund
- **May 2017:** Ole Reunion Challenge Blitz
- **May 31, 2017:** Last day of Fiscal Year 2017
- **June 2-4, 2017:** Reunion Weekend
CLASS AGENT ONLINE PORTAL

www.classagent.com

The Class Agent online volunteer portal provides volunteers flexibility and autonomy in their roles. Volunteers can access their account anytime, from anywhere, to get the latest information and updates about their assignments and class gift progress. After your account is activated, you will use it to select assignments, send solicitations, and thank donors. For additional training, contact the St. Olaf Fund office.

Selecting classmates to contact:
1. Click on “Add Prospects.”
2. Find classmates:
   - Use the “recommended for you” list – these classmates rise to the top of the list because they are predicted as mostly likely to give.
   - After selecting from the recommended list you can search for a specific classmate.
   - You can also browse your full class roster by clicking “show all prospects.”
3. Add a classmate:
   - Click on the name to open prospect profile.
   - Check the classmate giving history and contact info.
   - Click the “add prospect” option in the upper right-hand corner of the profile window.

Contacting classmates:
1. Select a classmate from your “my prospects” list in the lower half of your screen.
2. Click on the method of contact you would like to use – phone, text, email/letter, or other
3. Use the contact information listed to make your contact
4. Use the provided contact template or create your own message. Be sure to personalize the content!

Recording your progress:
1. Click “Report result” after making a call or sending an email or letter.
2. Select the appropriate button under “how did it go?”
   - Select “Need to re-contact” if you are waiting for a response.
   - Select “contact complete” only if the classmate declined making a gift, or after their donation is received and a thank you sent.
3. Write notes about the contact to help you remember your conversation or correspondence later.
4. Click submit to save your report and reference it later.

Bonus features!
- Dashboard: tracks your contact progress, number of donations made by your prospects, and shows “campaign ranks” including the participation rank, number of donors, and dollars (all giving) raised by your class. Official results will come from St. Olaf Fund staff!
- Resources: Documents such as your class goals, a committee roster, the volunteer handbook, and much more are available.
- Contact Manager: Submit questions or concerns or share contact information updates from your prospects using the drop-down menu in the upper right corner.
**Effective Solicitations and Responding to Objections**

We want you to be successful in your solicitations. Here are few ways we recommend you approach your work as a volunteer for the St. Olaf Fund.

**Select the best prospects.** As a volunteer, you play a key role in ensuring that donors give year after year. When you select classmates to contact, make sure they have a history of giving to the college. Your contact this year will ensure they continue to give and may inspire them to increase their giving or become a sustaining donor.

**Make connections.** Before you write to or call a classmate, take some time to read their information carefully. If you have things in common, refer to your shared interests and experiences. If you do not have shared experiences, that is fine too! Some of the best conversations stem from diverse perspectives.

**Learn about their philanthropic interests.** Ask your classmates what they are passionate about supporting with their giving. Help them connect those interests to St. Olaf outcomes or programs for students, such as the department that influenced their path after college or the student organization that fueled a passion for service.

**Share why you support St. Olaf.** The story of your personal support and why you give will help your classmates understand the importance of alumni giving. Your story can be a powerful step in reigniting someone’s passion for St. Olaf College.

**Make your message stand out.** When you send an email, make sure the subject line grabs their attention and shows that it’s a personal contact from a classmate, such as “Will I see you at reunion?” or “Please join me!” When composing your email, say who you are and why you are writing at the beginning. Always include the hyperlink to the online giving page in your message.

**Solicitation Content**

Whether composing an email or making a phone call, there are a few items of information you’ll need to cover:

1. Introduce yourself as a classmate from St. Olaf and a volunteer with the St. Olaf Fund.
2. Make the case for giving to the St. Olaf Fund (refer to p. 2)
3. Outline your class gift goals.
4. Ask your classmate to make a gift and include the link to St. Olaf’s online giving page: stolaf.edu/giving
5. Thank your classmate for their time.
Responding to Objections

Familiarizing yourself with some common concerns and appropriate responses will help you feel comfortable in your conversations. Remember though, that when responding to objections, authenticity and transparency are important. At the end of the conversation, if your classmate feels heard and listened to, that can make the difference in their giving. If there are any questions or concerns you do not feel comfortable answering, refer your classmate to the St. Olaf Fund office.

I don’t agree with the college’s policy on ____ and will not support the St. Olaf Fund.

- Thank them for their feedback and let them know you will pass along their concerns.
- Share a few reasons why you do give to the college, or how they can choose to designate your giving.

My child is in college… I can’t give on top of tuition!

- Ask how their child is enjoying school, what they’re studying, which extracurricular activities they’re involved in.
- Acknowledge that it is expensive to put a child through college!
- Share about the importance of alumni giving and engagement for grants and college ratings, which impact students’ experiences. Ask if they would be willing to make a participation gift at a level that is comfortable at this time. Remember, every gift counts.

Tuition should cover costs.

- Tuition doesn’t cover total costs now and it didn’t when you were a student either! Tuition only covers about 70 percent of the actual cost of a student’s education. This would only get students to spring break!
- Alumni gifts are important because they bridge the gap between what students and families can afford to pay and the actual cost of a St. Olaf education.

If my child wasn’t good enough to be accepted by St. Olaf, then neither is my money.

- Ask the parent about positive experiences their child is having at whichever school they decided to attend.
- Connect these experiences to ways St. Olaf impacted you or the classmate.
- If their student is enjoying and growing from their college experience, encourage the parent to give to celebrate their own alma mater.

I’m still paying back my loans/I’m in graduate school

- Acknowledge that loans and graduate school expenses can be a challenge.
- Ask how their graduate school or post-grad work is going.
- Encourage them to make a meaningful gift at a comfortable level. Again, every gift counts!
Volunteering During a Reunion Year

Alumni are welcomed back to the Hill for reunion the weekend after Memorial Day. Alumni celebrating a reunion are challenged to increase their giving in celebration of the St. Olaf community.

During a reunion year, volunteers with the St. Olaf Fund continue the work of Class Fund Agents, but operate as a committee, with additional classmates joining the team. The reunion gift committee works in parallel with a reunion program committee. Each gift committee works with a St. Olaf Fund staff member who manages several reunion committees, so you get the attention and support needed to make sure your reunion volunteer experience and reunion class gift are special and robust.

Reunion Volunteers are expected to...

1. LEAD by example. Make a gift to the St. Olaf Fund before asking classmates to give.
2. CONNECT with at least 20 classmates to encourage attendance and participation in the class gift.
3. ADVOCATE for All in for the Hill and the Ole Reunion Challenge.
4. THANK classmates for their gifts and support.
5. STAY INFORMED about news from the Hill through monthly volunteer newsletters and periodic committee conference calls.

Committee Collaboration
The gift committee and program committee for each reunion class work in parallel. In the spring, the groups will be in regular communication about activities during the weekend, special touches for the class, registration, and gift progress. Staff will facilitate collaboration between the groups.

Reunion Weekend
The class gift will be presented at All Alumni Celebration, following the All Class Parade, on the Saturday of reunion weekend. This is an opportunity to showcase your hard work and the generosity of your class. The rest of the weekend is yours to enjoy!

Reunion 2017 Volunteer Calendar

- Tuesday, October 11-Tuesday, October 25: Fall Blitz
- Tuesday, October 25: All in for the Hill
- Saturday, January 28: Reunion program committee workshop
- Monday, February 6: Spring class letter drafts due
- Saturday, March 4: Black and Gold Gala, Minneapolis, MN
- May: Ole Reunion Challenge Blitz
- June 1: Volunteer thank you dinner
- June 2-4: Reunion Weekend 2017
ST. OLAF FUND CONTACT INFORMATION

800-733-6523 | fund@stolaf.edu
stolaf.edu/giving
1520 St. Olaf Ave
Northfield, MN 55057

Steph McCluskey
Director of Annual Giving
Manager for 25th and 50th Reunions
507-786-3885 | mcclus1@stolaf.edu

Theresa Hoffman
Phonathon Manager
Manager for 5th, 10th, 15th, 20th reunion committees
507-786-3505 | hoffma1@stolaf.edu

Michael Kratage-Dixon
Associate Director of Annual Giving
Manager for 25th and 50th Reunions
507-786-3388 | kratag1@stolaf.edu

Jayne Overstreet
Annual Giving Coordinator
507-786-3354 | overst1@stolaf.edu

Amy Pagel
Associate Director of Annual Giving
Manager for Class Fund Agents and Gratitude Volunteers
507-786-3617 | pagel@stolaf.edu

Gina Tonn
Reunion Program Manager
Manager for 30th, 35th, 40th, 45th, 55th, 60th, 65th reunion committees
507-786-3394 | tonng@stolaf.edu
APPENDIX

How to Give
Making a gift to the St. Olaf Fund is easy. You may give:
- Online at stolaf.edu/giving
- By phone at 800-733-6523
- In the mail to The St. Olaf Fund, 1520 St. Olaf Ave, Northfield, MN 55057

We accept one time gifts paid by:
- Cash
- Check payable to St. Olaf College
- All major credit cards

Sustaining Gifts
Making a monthly gift is an easy and convenient way to make sure you give every fiscal year, and to ensure that St. Olaf remains a vibrant and academically rigorous institution.

To set up a monthly gift:
1. Visit stolaf.edu/giving to fill out the online form or call 800-733-6523.
2. Choose the amount you want to contribute each month.
3. Choose the account you’d like to use.

You may make changes to your monthly gift at any time. Contact the annual giving office at 800-733-6523 or send an email to fund@stolaf.edu, but please no credit card information over email or voicemail.

The St. Olaf Fund Glossary Contents:
1. Appeal: An appeal is mass communication soliciting gifts, sent by the St. Olaf Fund office to a wide audience. The St. Olaf Fund sends out three core appeals every fiscal year: fall appeal (September), calendar year end appeal (November - December), and fiscal year end appeal (April - May). All in for the Hill, class letters, and the volunteer blitzes are additional appeals that enhance these core appeals. These communications include mailings and emails. The student Phonathon also calls alumni throughout the academic year.

2. Assignment/prospect: Used interchangeably to refer to an alum selected by a Class Fund Agent or reunion gift volunteer. These classmates are contacted by volunteers through peer to peer solicitation.
3. **CFA:** Abbreviation for “Class Fund Agent.” CFAs are volunteers who contact classmates to encourage their participation in the St. Olaf Fund. Contact is made via email, letter, or phone call.

4. **Class Agent portal:** Class Agent is our online volunteer portal, accessible at classagent.com. Volunteers use an account in Class Agent to access contact information and track giving history for their classmates, and to send emails to their prospects.

5. **Class gift:** Class gift refers to accumulative donations made by alumni in the same class. Any gift made to the St. Olaf Fund by an alum counts toward their class gift, as well as to the overall St. Olaf Fund. During a reunion year, a class gift may be referred to as a “reunion class gift.” Reunion class gifts also include gifts to the endowment.

6. **Endowment:** The endowment is a permanent fund from which approximately four percent of the four-year average value is spent annually. The endowment principal is invested under the guidance of the officers of the college and the Board of Regents. Endowment funds come from gifts designated by donors for that purpose and through unrestricted bequests that the regents designate for endowment. St. Olaf Fund gifts are not invested in the endowment.

7. **Fiscal Year:** The St. Olaf College fiscal year runs from June 1 to May 31. Gifts to the St. Olaf Fund are counted within this period.

8. **Matching gift:** A matching gift is a contribution from a donor’s employer to colleges, universities, and other non-profit charities. St. Olaf donors are strongly encouraged to contact their employer’s human resources department for company-specific guidelines to secure matching funds for the college. For more information visit stolaf.edu/giving/matching-gifts.

9. **Planned gift:** Planned or deferred giving refers to gifts made through bequests, charitable trusts (which provide income to donors/beneficiaries), life insurance policies, and other long-term giving methods. For more information please contact the development office at 800-776-6523. Donors who include St. Olaf in their estate plans are recognized in the Manitou Heights Society.

10. **Reunion gift committee:** A group of volunteers for the St. Olaf Fund who will be celebrating a reunion at the end of a fiscal year. Reunion gift committees work with a staff manager. They also collaborate with the separate but parallel reunion program committee for their class.

11. **Reunion gift volunteer:** This title is used to refer to St. Olaf Fund volunteers who are celebrating a reunion at the end of a fiscal year. This title replaces “Class Fund Agent” during a reunion. The responsibilities are slightly different during a reunion and volunteers work in committees with a different staff manager.

12. **Restricted gift:** Any gift for a specific purpose. Restricted gifts to a specific department, program, team, etc. are counted in the St. Olaf Fund unless they are gifts to the endowment or for capital projects. Donors may select a designation when they give online, over the phone, or in the mail by including a note.

13. **Segment:** A group of potential donors who receive a fundraising message tailored to their interests or characteristics. For example, alumni of a sports team receive a fundraising message that features current Ole athletes.
14. **St. Olaf Fund/Annual fund:** The St. Olaf Fund is St. Olaf College’s annual fund. This means that donors are asked to make a gift every fiscal year, and those gifts directly support activities in the current or following fiscal year.

15. **Sustaining or recurring gift:** Sustaining gift and recurring gift are used interchangeably to refer to a monthly gift made on the 1st or 15th of every month.

16. **Unrestricted gift (Current Priorities):** Unrestricted gifts or gifts for “Current Priorities” can be used for the most pressing needs of the college. Current unrestricted gifts support the current expenditures budget and are used within the fiscal year in which they are received. To make an unrestricted gift, donors indicate “Current Priorities” online or by not specifying a designation over the phone or by mail.

**Contact Templates**
Solicitations are most meaningful when written in your voice. These simple templates and the “Effective Solicitations” section on page 8 are a place to start, and you can take it from here!

**Sample solicitation:**

Dear __________,

This is __________from St. Olaf Class of __________. I am volunteering to help raise support for the St. Olaf Fund. Thank you for making gifts to the annual fund before (if appropriate). Our gifts (continue to have) an immediate impact for current students, and ensure St. Olaf remains vibrant for years to come. You may choose to support current operations, or direct your gift to a department or activity that made a lasting impact on your life. Please consider making a gift again this year at stolaf.edu/giving. It’s quick and easy.

Thank you for your support. I hope you are doing well! Um! Yah! Yah!

Your name

**Sample thank you:**

Dear __________,

Thank you for supporting the St. Olaf Fund! Participation in the annual fund is an important way for us to support current and future Oles. Your gift makes a difference for life on the Hill!

I am glad we were able to connect and hope you are doing well.

Thank you again,

Your name