GUIDE FOR VOLUNTEERS

THE MOUNT HOLYOKE FUND
A legacy of looking forward and giving back

A LEGACY OF LOOKING FORWARD

Mount Holyoke
and GIVING BACK
# TABLE OF CONTENTS

Welcome ............................................................................................................. 03

Being a volunteer: three easy steps ............................................................... 04

Volunteer roles and committees ................................................................. 05

About giving to The Mount Holyoke Fund

Why give to The Mount Holyoke Fund? ....................................................... 08

Where and when can alumnae give? ........................................................... 10

How can alumnae make a gift — and increase the impact of it? ............... 12

Who belongs to our giving societies? ............................................................ 15

Tools at your fingertips .................................................................................. 17

Making the ask ................................................................................................ 18

Having a helpful conversation ....................................................................... 20

Responding to concerns ................................................................................ 21

Glossary ............................................................................................................ 22
WELCOME — and THANK YOU

Thank you for being a part of The Mount Holyoke Fund team! You join a team 800 strong — including members from the class of 1943 to current seniors. Your work is essential to connecting your class to the College and strengthening Mount Holyoke’s legacy.

The members of The Mount Holyoke Fund Committee are experienced volunteer leaders who partner with Mount Holyoke Fund staff members to drive support of The Mount Holyoke Fund.

One of the committee’s key initiatives is to serve as a source of guidance and support to fellow volunteers. We are here to ensure that you have the resources you need to succeed in your role!

Please contact us if you have any questions — and thank you in advance for keeping the vital mission of Mount Holyoke College strong today and in the future.

With appreciation,

MOUNT HOLYOKE FUND COMMITTEE CO-CHAIRS

Sally Donner ’63  sdonner736@gmail.com
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Casey Accardi ’15  accar22c@mtholyoke.edu
Mount Holyoke Fund volunteers are key members of The Mount Holyoke Fund team. Alumnae are far more likely to make a gift when asked to do so by a classmate than by the institution. You serve as a primary contact between the College and your classmates.

The two key goals of our volunteer program are to increase class participation and keep individual classmates connected to each other and the College. To be a stellar Mount Holyoke Fund Volunteer:

**LEAD BY EXAMPLE.**
Make your gift to Mount Holyoke by December 31.

**REACH OUT.**
- Say hello and share news from the College.
- Make the ask (now easier than ever through the Volunteer Hub).
- Say thank you!

**PASS ALONG INFORMATION**
you learn from your outreach.

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**Confidentiality agreement**
As a Mount Holyoke Fund volunteer, you have access to confidential information that is intended solely for your use as a volunteer. This information should not be shared with anyone, nor should it be used for commercial, political or private fundraising purposes.
VOLUNTEER ROLES

HEAD CLASS AGENT
A vital part of class leadership, Head Class Agents are responsible for sharing the message about the importance of annual giving to Mount Holyoke through The Mount Holyoke Fund. They work with Mount Holyoke Fund staff and a team of volunteer Class Agents to coordinate class-based giving efforts by setting goals, managing class volunteers and reaching out to individual classmates.

CORNERSTONE CHAIR
Cornerstone Chairs work closely with Head Class Agents throughout the five-year Reunion cycle to develop a strategic plan for raising Cornerstone gifts of $1,837 or more from classmates. Leadership gifts make up approximately 75 percent of The Mount Holyoke Fund.

LAUREL CHAIN SOCIETY CHAIR
Laurel Chain Society Chairs work closely with Head Class Agents to encourage consistent giving to The Mount Holyoke Fund. They recognize and steward consistent donors — and identify and connect with potential Laurel Chain Society members.

CLASS AGENT
Class Agents support class fundraising efforts by reaching out to classmates a few times a year, such as during challenges and at the end of the fiscal year. They typically work with Head Class Agents to select a small group of classmates for direct outreach.

SOCIAL MEDIA AMBASSADOR
Social Media Ambassadors use social media (such as class groups on Facebook) to share content related to the College, their class and The Mount Holyoke Fund. This outreach is particularly important during key fundraising times, such as challenges and the end of the fiscal year.
VOLUNTEER COMMITTEES

MOUNT HOLYOKE FUND COMMITTEE
Term length: two years
Members work with staff in The Mount Holyoke Fund to support the volunteer program and help achieve annual fundraising goals. Alumnae from all decades serve on the committee.

BEYOND THE 50TH COMMITTEE
Term length: two to three years
This committee works with staff in The Mount Holyoke Fund to support the volunteer program and help achieve fundraising goals, with a special lens toward classes who have already marked their 50th Reunion.

50TH REUNION LEADERSHIP GIFT COMMITTEE
Term length: two to four years
Each 50th Reunion cycle class recruits a 50th Reunion Leadership Gift Committee, which is also known as the 50th Reunion Philanthropy Committee. It is tasked with peer-to-peer outreach and solicitation of classmates who have the potential to make a significant gift to The Mount Holyoke Fund.

See you on campus:
Members of the volunteer committees above meet periodically on campus.
WHY GIVE TO THE MOUNT HOLYOKE FUND?

PARTICIPATION
Annual giving to The Mount Holyoke Fund demonstrates a vote of confidence in the College. Outside organizations, including foundations, view participation as one measure of the overall strength of an institution. Participation also impacts Mount Holyoke’s ranking among liberal arts institutions, including as determined by U.S. News & World Report.

PAY IT FORWARD
Gifts to The Mount Holyoke Fund enable the College to continue its legacy into the future. The generosity that was so important in founding Mount Holyoke is even more important now, as it ensures that Mount Holyoke will be here for the students of tomorrow.

PRIDE + INNOVATION
Giving to The Mount Holyoke Fund allows the College to attract and retain faculty who are leaders and innovators in their fields — and to introduce new programs and support existing ones. Such gifts also allow the College to meet emerging needs and challenges.

Note:
When you reach out to classmates, keep in mind that there are many personal things that impact why, when and how they make their gift — and what they choose to support.
TOP FIVE REASONS TO GIVE TO MOUNT HOLYOKE?

1. **TO CREATE A DIVERSE COMMUNITY** by enabling Mount Holyoke to offer financial aid to students with need.

2. **TO FOSTER INTELLECTUAL CURIOSITY** by creating opportunities for students and faculty members to collaborate and innovate.

3. **TO ENABLE FACULTY TO DEVELOP NEW COURSES** and incorporate new technologies, tools and perspectives.

4. **TO PROVIDE OPPORTUNITIES FOR STUDENTS TO APPLY WHAT THEY LEARN** in the classroom to real-world issues — and to develop the skills needed to be competitive in a global marketplace.

5. **TO SUPPORT OPPORTUNITIES TO DEVELOP LEADERSHIP AND TEAM-BUILDING SKILLS** through student organizations and varsity and club sports.
WHERE CAN ALUMNAE GIVE?

The Mount Holyoke Fund has 12 different gift destinations that allow alumnae to choose their area of impact.

**ACADEMIC ENRICHMENT:** Support academic departments, curriculum development, instructional programs and the academic centers.

**ATHLETICS:** Support athletic and recreational activities for students that promote health, personal growth, school-life balance and leadership.

**CAMPUS PRESERVATION:** Help maintain and preserve our historic buildings and grounds, and protect the natural characteristics of campus.

**DIVERSITY, EQUITY AND INCLUSION:** Support projects and initiatives — such as the MoZone Peer Education Program, the cultural centers, speakers and special events — that foster a campus environment that is inclusive, pluralistic and free of discrimination.

**FACULTY:** Help attract and retain excellent professors and maintain a small student-to-faculty ratio.

**LIBRARY AND ARCHIVES:** Ensure the preservation and advancement of our premier research library, special collections and historic archives.
THE LYNK AND CAREER PREPAREDNESS: Support internships and research opportunities, programming and enhanced advising.

SCHOLARSHIPS: Honor the College’s long tradition of providing scholarship aid to exceptional students from all economic circumstances. A gift of $10,000 or more, directed to The Mount Holyoke Fund Scholars Program, provides a one-year named scholarship to a student with demonstrated need.

STUDENT LIFE: Support the myriad activities that enrich student life, including student-run clubs and organizations, residence hall programs and M&Cs!

SUSTAINABILITY INITIATIVES: Help the College train the next generation of environmental leaders — via the Campus Living Laboratory, environmental internships and research — and meet its pledge for carbon neutrality.

TECHNOLOGY AND TEACHING TOOLS: Help to provide and maintain laboratory equipment, computers, software and mediated classrooms.

WHEREVER MOUNT HOLYOKE NEEDS IT MOST

WHEN IS THE TIME TO GIVE?

The fiscal year runs **July 1 – June 30**. By making your gift early in the fiscal year, you help the College save resources and plan for the year.
HOW CAN ALUMNAE MAKE A GIFT?

ONLINE
mtholyoke.edu/go/mhcgive

PHONE
800-642-4483

CREDIT CARDS
Visa, MasterCard, American Express and Discover accepted

CHECKS
Made payable to Mount Holyoke College

PAYPAL
mtholyoke.edu/giving/cash

MAIL
Mount Holyoke College
The Mount Holyoke Fund
50 College Street
South Hadley, MA
01075-1485

MHC TAX ID#
04-2103578
“Trustees of Mount Holyoke College”

HOW CAN ALUMNAE INCREASE THE IMPACT OF THEIR GIFT?

SUSTAINING GIFTS
Sustaining gifts, which can be made online, are automatically charged to your credit card each month and are automatically renewed at the beginning of each new fiscal year (July 1 – June 30).

RECURRING GIFTS
Recurring gifts, which can be made online, are automatically charged to your credit card each month for a set number of months.
GIFTS OF SECURITIES AND MUTUAL FUNDS
Gifts of appreciated securities are tax deductible at full fair-market value if the donor has owned the asset for at least one year. For details, contact Laurie Gherardi, senior gift records specialist, at 413-538-2768 or lgherard@mtholyoke.edu.

CORPORATE MATCHING GIFTS
Many businesses and corporations match personal gifts to educational institutions made by employees, retirees and their family members. Contact your company’s personnel office for more information. Donors receive recognition for their gift plus the amount of the matching gift. To learn more, contact Maura Campbell, senior gifts coordinator, at 413-538-2031 or campbelm@mtholyoke.edu.

QUALIFIED CHARITABLE DISTRIBUTION (IRA CHARITABLE ROLLOVER)
If you are at least 70 ½ years old, you can make a tax-free gift from a traditional IRA. (Other retirement plans, such as 401(k)s and 403(b)s, are not eligible.) You must transfer your gift directly from your IRA administrator to Mount Holyoke College. The total of all of your rollover gifts in any one year cannot exceed $100,000 per person. The benefits of making an IRA charitable rollover gift include:

• You satisfy the required minimum distribution, which is not included in taxable income.
• You avoid income tax on IRA withdrawals.

CREATIVE, FLEXIBLE GIVING OPTIONS
Planned giving provides lots of creative solutions to philanthropic gifts, life income needs and tax relief. If you or your classmates have planned giving questions, visit giftplanning@mtholyoke.edu.
WHO BELONGS TO OUR GIVING SOCIETIES?

**THE CORNERSTONE SOCIETY** recognizes donors who make gifts of $1,837 or more to Mount Holyoke each year. Young alumnae Cornerstone giving levels begin at $100 for first-year graduates. Visit mtholyoke.edu/giving/cornerstone_program for more information.

**THE LAUREL CHAIN SOCIETY** honors the loyalty of donors who make gifts to Mount Holyoke (of any amount, to any fund) for three consecutive years, including a gift in the current fiscal year. Alumnae who are one to three years out are eligible for membership with a gift in the current fiscal year. Membership is retained by supporting the College each fiscal year. Visit mtholyoke.edu/giving/laurel-chain-society for more information.

**THE MARY LYON SOCIETY** honors those who have named the College as a beneficiary of a will, trust, retirement plan or life insurance policy. It also honors those who have established a life income gift with the College. For more information, visit giftplanning.mtholyoke.edu.
TOOLS AT YOUR FINGERTIPS

To support your work, The Mount Holyoke Fund offers a number of helpful resources.

MOUNT HOLYOKE FUND STAFF LIAISONS provide each class with guidance, advice and support.

THE MOUNT HOLYOKE FUND COMMITTEE drives support of The Mount Holyoke Fund through volunteer mentoring and training, alumnae engagement and strategic solicitation.

THE VOLUNTEER HUB (MY.MTHOLYOKE.EDU) is a central online resource that provides a comprehensive tool kit for volunteers who support the Office of Admission, the Office of Advancement and the Alumnae Association.

THE MHF VOLUNTEER PAGES (MTHOLYOKE.EDU/GO/MHFVOLUNTEER) provide numerous resources for your volunteer work.

THE MHF VOLUNTEER FACEBOOK PAGE (FACEBOOK.COM/GROUPS/MHFUNDVOLUNTEERS) provides an opportunity for Mount Holyoke Fund volunteers to connect, ask questions and share information through social media.
MAKING THE ASK

STEP 1: PREPARE

- Make your own gift first and reflect on why you support MHC.
- Review your assignments’ giving histories. Are they consistent donors? Did they give last year?
- Stay informed. The more you know about what’s happening at Mount Holyoke today, the easier your job will be.

STEP 2: CONNECT

- Think about the most effective way to contact each individual:
  - Phone call
  - Email
  - Social media
  - Face-to-face
- Consider a common thread that ties you together (major, club, residence hall, etc.).
- Encourage attendance at Mount Holyoke events (e.g. Reunion).
- Did your classmate make a gift last fiscal year? If so, express thanks!
- Explain your own motivations for giving: (e.g. “I give because I received a scholarship when I was at Mount Holyoke”).
• Listen. Don’t expect an immediate commitment. Your classmate may need time to think or consult with others.

• Emphasize participation and consistent giving.

• Ask if their employer has a matching gifts program.

• Check contact information. Confirm mailing address, telephone numbers and email address.

• Refusal? Try to find out more about your classmate’s feelings about Mount Holyoke (see the tips on page 20).

• Share any feedback with your Mount Holyoke Fund staff liaison.

**STEP 3: FOLLOW UP**

• Express thanks for your classmate’s time and support, whether or not a gift was made.

• After a gift is made, send an email or a handwritten note. Doing so is always appreciated and encourages future philanthropy.
HAVING A HELPFUL CONVERSATION

In some instances, you may have challenging conversations with classmates. They may relay to you that they can’t support Mount Holyoke because they had a negative experience, they disagree with a change at the College or they don’t have the resources. In these instances, try the following:

LISTEN TO WHAT IS BEING SAID (and what isn’t being said). Rather than trying to convince classmates that they are wrong, it can be helpful to identify their specific barriers to giving.

IDENTIFY A SHARED GOAL OR IDENTITY. Mount Holyoke will always be changing, and sometimes these changes can make alumnae feel less connected to the College. Identifying shared goals of maintaining Mount Holyoke’s standing globally, or a shared identity as members of the crew team, for example, can help remind classmates of their connections to Mount Holyoke.

REDIRECT THE CONVERSATION. Once you find a point of connection, see if you can shift the conversation from negative thoughts or memories to more positive ones. Your classmate might not like the idea of the new Dining Commons, but might be really interested in the new Maker and Innovation Lab or the Restoration and Ecology Program. If a classmate doesn’t like a new change, try discussing your favorite traditions or a beloved professor.

SHARE WHAT YOU LEARN AND SEEK OUT MORE INFORMATION. Your classmates might have questions about something that you haven’t heard of, or they might share information that you didn’t know. Feel free to say, “I’ll have to look into that.” Then contact your Mount Holyoke Fund staff liaison to get more information.
RESPONDING TO CONCERNS

OBJECTIONS: I am not interested. I don’t have any money. I can’t make a large gift.

RESPONSE: Every gift counts and every gift matters! The percentage of alumnae who give is just as important as how much they give. We ask that you consider making a gift at a level that is meaningful and manageable for you. Your participation is what makes a difference for the students at Mount Holyoke.

OBJECTIONS: I’m concerned with recent decisions by the College. I question the direction of the College.

RESPONSE: Thank you for sharing. I know Mount Holyoke values alumnae input, and I will certainly pass along your concerns to the College. It is evident that you still care about Mount Holyoke. I hope you will still consider giving because you value your own Mount Holyoke experience.

OBJECTIONS: Doesn’t tuition cover the College’s expenses?

RESPONSE: Tuition never covers the entire cost of educating a student at Mount Holyoke — or at any of our peer institutions — even for “full pay” students. Tuition revenue covers about 60 percent of the actual cost of a Mount Holyoke education. The remaining costs are covered by income on the endowment, grants from foundations and corporations, and gifts from alumnae, parents and friends.

OBJECTIONS: I had a bad experience at MHC.

RESPONSE: Could you tell me more about what happened so I may relay your concerns to the appropriate contact on campus? Alumnae support is necessary to improve the services available to current students and may address the situation you described.
GLOSSARY

THE MOUNT HOLYOKE FUND (MHF): The Mount Holyoke Fund is the College’s annual fund. All gifts to The Mount Holyoke Fund are considered unrestricted and are put to use immediately in support of the College’s operating budget.

APPEAL: A solicitation from the College via snail mail or email.

“ASK” AMOUNT: A specific gift amount that alumnae are asked to give during solicitations.

CORNERSTONE GIFTS: A gift of $1,837 or more to the College. Young alumnae Cornerstone levels begin at $100. Donors at this level are recognized as members of the Cornerstone Society.

ENDOWMENT: A portion of Mount Holyoke’s assets that are held in “savings” to generate income forever. Mount Holyoke relies on endowment income to support long-term campus initiatives and projects such as scholarships, professorships and programs.

FISCAL YEAR: Mount Holyoke’s fiscal year runs July 1 – June 30.

GIFT DESTINATION: Our gift “destinations” are designations within The Mount Holyoke Fund that support the 12 areas of greatest need at the College.

LEADERSHIP GIFT OFFICERS: These staff members work with alumnae who are capable of making a gift of $100,000 or more to the College. Leadership Gift Officers work regionally and focus on connecting alumnae to the College and exploring specific philanthropic interests at Mount Holyoke.
**LYBUNT:** Someone who gave “Last Year, But Unfortunately Not yet This” year. These classmates are most likely to give again this year.

**MATCHING GIFT:** Donations given by a company or foundation to match the gift made by an employee or the employee’s spouse or partner.

**MOUNT HOLYOKE FUND SCHOLAR:** A student who is granted a one-year named scholarship from a donor who makes a gift of $10,000 or more to The Mount Holyoke Fund Scholars program. The donor receives a letter from the scholarship recipient.

**OTHER GIFT (AS IT APPEARS IN VOLUNTEER HUB REPORTS):** A gift to any College fund other than The Mount Holyoke Fund.

**PHONATHON:** Students make calls on behalf of The Mount Holyoke Fund throughout the academic year and into June. They serve as ambassadors for Mount Holyoke and look forward to connecting with alumnae.

**RESTRICTED GIFT:** Gifts that are directed to a specific purpose do not count toward The Mount Holyoke Fund — but do count for participation and in comprehensive fundraising totals.

**SOLICITABLE BASE:** The number of classmates who are actively receiving solicitations from the College. This number is used as the denominator to determine class participation rates. The total number of classmates may be larger than the solicitable base.

**SYBUNT:** Someone who gave “Some Year, But Unfortunately Not yet This” year.

**UNRESTRICTED GIFT:** Gifts that are made without specific limitations. Gifts to The Mount Holyoke Fund are unrestricted and allow the College to be flexible and innovative.
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