

MILTON *fund*

Volunteer Handbook 2015-2016



Office of Development & Alumni Relations
Milton Academy
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A Message of Thanks

Dear alumni volunteers,

Thank you for your service as a Milton Fund volunteer. Milton attracts and produces some of the best and brightest students in the world, and cultivates in them a passion for learning so that they can seek meaningful lives, and live by our motto, "Dare to be true."

This is made possible, in large part, by the steadfast commitment and support of you, our class agents. You help shape the unique learning experience for Milton students by helping to raise critical funds that are used to invest in and retain a world-class faculty, develop an innovative and rigorous academic program, and ensure the depth and character of our community through financial aid support.

The Milton Fund volunteer program has proven to be uniquely successful in enhancing alumni connections with our School, as well as boosting the overall annual giving participation rate. Since we cannot reach out to every individual alumnus/a, we rely on the help of devoted alumni volunteers, like you, to personalize our annual giving campaign efforts. However, in reaching out to your fellow alumni, you are doing far more than asking for a gift. You are engaging your classmates in the life of your alma mater. This important work is achievable only with your help.

We look forward to working with you to ensure the continued success of Milton Academy.

Best,

The Annual Fund Staff



Liz Dixon-Eversole
Director of the Milton Fund



Caitlin Donnelly
Annual Giving Officer, Alumni



Susan Helm
Annual Giving Officer, Alumni



Laura Wyrick
Annual Giving Officer, Young Alumni

Milton Academy's Mission

Milton Academy cultivates in its students a passion for learning and a respect for others. Embracing diversity and the pursuit of excellence, we create a community in which individuals develop competence, confidence and character. Our active learning environment, in and out of the classroom, develops creative and critical thinkers, unafraid to express their ideas, prepared to seek meaningful lifetime success and to live by our motto, "Dare to be true."

Volunteer Roles and Responsibilities

Mission

Milton works hard to engage our alumni community. From the bi-annual Milton Magazine, to quarterly news, monthly e-newsletters, and periodic Milton Fund messages, alumni receive a lot of information from the School. However, as good as this communication may be, **it can't replace the personal touch of a fellow classmate.**

Program Goals

The goal of the Milton Fund Volunteer Program is to enhance our alumni's relationship with the School. You play an essential role in helping Milton reach its 2015-2016 Milton Fund goal of raising \$4.5 million and engaging 30% alumni participation. As a volunteer you are encouraged to:

- **Lead by example.** Show your commitment to Milton by giving early in the fiscal year.
- **Educate** your classmates on the importance of supporting the Milton Fund and increasing your class's annual giving and participation.
- **Serve as an ambassador.** Stay in contact with classmates regularly and provide feedback to the development office on classmates' interests, concerns, news, and updated contact information.

Responsibilities

Milton Fund volunteers are responsible for championing fundraising efforts of his or her class each year. As a volunteer, your personal dedication, enthusiasm, and contributions can play a vital role in keeping your classmates connected, and encouraging their annual support of Milton.

Volunteers are encouraged to:

- Make a gift to the Milton Fund that you feel good about. Making a gift, early in the fiscal year, is the best preparation for seeking equally generous and thoughtful gifts from others. Your gift will serve as an example.
- Communicate regularly with your classmates via phone calls, emails, and social media with updates and campus news.
- Write letters to your classmates in the fall and spring.

- Attend and encourage attendance of alumni events, campus happenings, and Reunion Weekend if in a reunion year.
- Identify members of your class who may have the capacity to make a leadership gift, and communicate specific donor interest and concerns to the development office.
- Be knowledgeable about the careers and interests of fellow classmates.
- Help in thanking classmates who have made gifts through thank you notes, personal phone calls, or e-mails.
- Coordinate with development office in rallying your class to the aid of any classmates in need (from sending sympathy cards for sickness and death to assisting classmates in need of volunteer help)
- Contact classmates to help publicize upcoming alumni events, meetings, networking events, special lectures, athletic contests, drama productions, etc.

Milton Fund Volunteer Participation Timeline

July – August

- Make your gift!
- Help track down current contact information for any “lost” classmates

September – October

- Attend volunteer reception on October 7, 2015
- Draft your fall letter
 - Letter Content:
 - Development office can provide a template
 - Signatures
 - Option 1: Volunteer hand signs each letter and, when possible, includes personal note
 - Option 2: Development Office inserts class agent’s scanned signature
 - Mailing
 - Option 1: Volunteer mails letters
 - Option 2: Development office mails letters

November

- After the fall letter is mailed, follow up with individual assignments is encouraged via phone, email, social media, and/or personal meetings (when possible)

December

- Calendar year end outreach to classmates encouraging support of the Milton Fund

April – May

- Draft your spring letter (same options as in fall)

June

- Final outreach to classmates encouraging support of Milton Fund and, if in a reunion year, attendance of Reunion Weekend, June 17-18, 2015

Overview of Giving

Why the Milton Fund is Important

Why should I give to the Milton Fund?

You may have noticed that beginning this school year, Milton Academy rebranded its Annual Fund as the Milton Fund. The Milton Fund remains the School's primary way for alumni, parents and friends to support our School. By providing current use, operating revenue, the Milton Fund affords academic leadership the freedom and flexibility to respond to pressing needs and promising initiatives. The Milton Fund will reduce the School's dependence on tuition and increase its ability to seize new opportunities. The Milton Fund accounts for 7% of the School's operating budget, and supports Milton's academic programs, faculty development, technology enhancement, facilities upgrades, financial aid, and student life. In this way, your contribution is your opportunity to help shape the experience of every Milton student.

Why should I ask my classmates and fellow alumni to give?

By asking your friends and classmates to *join you* in making a gift, you are leading by example and serving as an inspiration to others. Your personalized outreach will inspire much greater generosity than would a letter, or call, from a Milton staff member. Your outreach through phone calls, letters, emails, and meetings with your classmates, asking for their support, is the *most* important job you can do as a volunteer.

Participation in the Milton Fund is also an important measure of alumni satisfaction with Milton Academy. Alumni giving rates are points of pride and measure the health of our school. Annual gifts from alumni therefore serve as a continuing endorsement of the Academy, strengthening its visibility and prestige worldwide. There are many worthy causes which deserve our support. But one student, educated in the Milton tradition, can positively affect an untold number of lives.

Why are unrestricted dollars needed?

Tuition and fees cover 68% of the full cost of educating a Milton student. This gap of over \$15,000 is filled by generous gifts to the Milton Fund and endowment income, giving each student a "hidden scholarship." In other words, when you were attending Milton, your education was subsidized by past donors, even if you were paying full tuition. We now need your help to continue presenting this advantage to current and future Milton students.

What are the goals for the 2015-16 Milton Fund?

The 2015-16 Milton Fund began on July 1, 2015 and will end on June 30, 2016. The goal for fiscal year 2015-16 is \$4.5M, with 30% alumni participation.

In 2014-15, the Annual Fund achieved a total of \$4.39 million. Significant increases in leadership giving from alumni, parents, and friends have spurred the Annual Fund on to new heights.

Is my Milton Fund gift my Dare campaign gift?

For most donors, the Milton Fund will be the primary way to support Dare: The Campaign for Milton, the most ambitious fundraising effort in Milton's history. Some donors will also contribute through endowment, plant or planned gifts. Because the Milton Fund is essential to Milton's ability to provide a top-notch education year in and year out, every person connected to Milton should strive to give annually to the Milton Fund during each year of the campaign and beyond.

Guide to Making a Gift

Ways to Give

1. Online

Online giving is quick, convenient, and environmentally friendly. Make your gift online by visiting <http://connect.milton.edu/donate>.

2. Monthly Recurring Gifts

Monthly recurring gifts offer the opportunity to make gifts that add up over time and provide Milton with a predictable source of support. In this way, a monthly giving plan may allow you to make a larger impact on the School than might otherwise have been possible. Payments will be automatically charged to your credit or debit card on the 15th of each month through the end date of your choice. To set up a recurring gift schedule, visit <http://connect.milton.edu/donate> or contact Laura Rogers, Data and Gift Entry Coordinator, at 617-898-2383.

3. Mail

You can mail your gift directly to:

Development and Alumni Relations Office
Milton Academy
170 Centre Street
Milton, MA 02186

Please make all checks payable to Milton Academy.

4. Phone

All donors are welcome to make a gift by calling the Office of Development and Alumni Relations at 617-898-2326.

5. Planned Gifts

Planned gifts help an individual establish a legacy at Milton Academy that extends far beyond his or her lifetime. For information on how to include Milton Academy in your estate plans through a bequest, beneficiary designation, charitable gift annuity, charitable remainder trust, charitable IRA rollover, and more, please visit <http://www.legacy.vg/milton/giving/1.html> or contact Suzie Greenup, Director of Gift Planning, at 617-898-2376 or by email at suzie_greenup@milton.edu.

6. Gift of Stock or Wire transfer

Please visit <http://connect.milton.edu/transfereinstructions> or contact the Office of Development and Alumni Relations for instructions on how to make a stock or wire transfer to the Academy.

7. Matching Gifts

Many employers and companies will match their employees' philanthropic contributions. Your generosity to Milton Academy could be doubled or even tripled! Ask your HR representative today to confirm if your firm/company has a matching gift program. To send your Matching Gift Form to Milton, please fax to: 617-898-1704 or mail to the Alumni & Development Office.

Making a Successful Milton Fund Call

As a Milton Fund volunteer, your role is simple:

- Motivate your classmates to support Milton by sharing your own reasons for giving.
- Provide them with the information, time and support they need to comfortably make a gift decision.
- Stay in touch with your classmates and keep them up to date on Milton news and events.

Follow these steps for making a successful call or email:

Step 1: Prepare

- Remember that you are representing Milton. Review the "Overview of Giving" and other resources about the Milton Fund. Be sure that you understand and can explain why the School needs financial support.
- Lead by example. It's easier to ask for a gift if you've already made your Milton Fund commitment.
- Review your classmate's history provided to you by the School via AgentSphere. Has he or she given every year? Does your classmate have a child at Milton or one who has graduated from the School?

Step 2: Make contact

- Introduce yourself and explain that you are reaching out on behalf of Milton.
- Thank them for their past support, and acknowledge significant increases or an impressive number of consecutive years giving.
- Share your own reasons for giving and ask for their support. Suggest the specific amount, provided to you by Milton.
- Thank them if they agree to make a gift. If a pledge is made, record the specific dollar amount in AgentSphere and staff will follow up.
- Listen thoughtfully to any objections. If you do not feel you can address their concerns, put them in touch with your annual giving staff liaison.
- Have a conversation. Catch up with your classmates, share Milton news and encourage them to attend Reunion Weekend, if in a reunion year.

Step 3: Follow up

- Report your results to your staff liaison or in the Milton Fund volunteer site (<https://www.agentsphere.net/milton/login>) so the annual giving staff can follow up promptly on pledge commitments, refusals, or contact info updates.
- Say thank you with a personal note or email as soon as possible.

Calling Script

Here is a sample calling script, but remember that personal outreach is the most effective! Make your calls specific to you and your classmates, but feel free to use this script as a starting point:

"Hi, is _____ available? This is _____. I am volunteering for our class, and I'm calling to discuss this year's Milton Fund effort. Do you have a few minutes to talk?"

"How have you been? Have you been back to campus recently? [Acknowledge past support, confirm contact information and learn more about them. Listen and take notes!]"

"I'm hoping our conversation today will encourage you to join me as a donor to the Milton Fund which supports about 7% of Milton's operating budget including: faculty development and financial aid. Are you willing to commit to a gift of \$____ [see target amount in AgentSphere]? Explain the need to recruit many new donors, as well as encourage consistent donors to increase their gift. Encourage your classmates to consider a stretch gift in honor of their reunion, if in a reunion year."

If the answer is NO then try: "We would appreciate a gift of any amount. Would you consider a smaller gift to help our class attain our desired participation rate which is an important measure of the School's strength? If the answer is still no then ask why and explain that you'd like to pass concerns back to the development office and that you hope that Milton can depend on his or her support in the future."

If the answer is YES, explain that the gift can be made online with credit card at <http://connect.milton.edu/donate>, by calling the Development and Alumni Relations Office at 617-898-2383 or by sending a check payable to Milton Academy to:

Development & Alumni Relations Office
Milton Academy
170 Centre Street
Milton, MA 02186

Be sure to close the call by thanking your classmate and let them know how important their support is to the School!

Once you have concluded the call, update your classmate's record in AgentSphere with any information you learned and send a thank you note or email to the classmate you contacted.

Email Outreach Templates

Email is an effective way to communicate with your classmates about the Milton Fund, especially when used along with personal contact such as phone calls. The most successful outreach is the most personal. Be sure to make the case for giving to the Milton Fund and evoke memories and elicit pride for Milton. Here are some sample emails to get you started.

Sample Solicitation Email:

Dear XXXX,

It's hard to believe how quickly time has passed since our graduation, but I think fondly of our time at Milton and I hope that you do too. [Insert any personal comments!]

Milton's legacy of academic excellence relies on our continued support. I am writing to ask you to consider joining me in making a gift to this year's Milton Fund in honor of the class of _____. I'm hoping to see X% of our class participate in the 2015 - 2016 year. Please give to Milton at a level appropriate for your own circumstances, online at <http://connect.milton.edu/donate> or by sending a check to:

Development & Alumni Relations Office
Milton Academy
170 Centre Street
Milton, MA 02186

I'm volunteering as a class agent to support the School and also to help keep in touch with those we've lost sight of over the years. I'd love to catch up and find out how you've been.

Again, thank you for your support.

Sincerely,
XXXX

Sample Thank you Email:

Dear XXXX,

Thank you for supporting Milton by participating in our class of _____ gift. Cumulatively, our gifts have a real and immediate impact on campus. Your Milton Fund gift enables Milton to meet our most pressing institutional needs, faculty development and financial. We greatly appreciate your continued support.

Sincerely,
XXXX

Class Letter Template

Dear <Salutation>,

Hello Class of ____! Since our time as students, we have all drawn from our Milton experiences. Whether we have relied on our close relationships with friends and mentors, utilized the knowledge and skills we gained or benefited from the curiosity we developed, we have all led meaningful lives full of learning and discovery.

This is a good place to insert Milton memories and shared experiences with your class.

We hope you will join us in making a gift to support the mission and memories of Milton (in honor of our ____ Reunion OR in honor of the class of ____). The Milton Fund, which last year raised more than \$4.39 million, is absolutely essential in closing the gap between revenues (tuition and endowment) and costs (academic and extracurricular programs, faculty salaries, financial aid). When you make your gift this year, consider directing it to one of the areas below that you want:

Faculty Development: You support the professional growth and salaries of the talented and caring faculty members at Milton.

Financial Aid: You sustain Milton's commitment to enrolling outstanding and qualified applicants regardless of their families' financial circumstances.

The School's Greatest Needs: You reduce Milton's dependence on tuition and increase our ability to seize opportunities.

Last year, our class was proud to be at XXXX% participation. Let's try to surpass that in the coming year. No gift is too small (or too large).

Thank you for your support,

<Name>

Reunion Committee/Class Agent/1798 Volunteer