

# LEAP<sup>of</sup> FAITH

Expect more  
from your  
annual giving  
volunteers —  
and you  
might get it



By ROBERT A. BURDENSKI

In his early days at Phillips Exeter Academy, Annual Giving Director Wayne Loosigian was frustrated because volunteers didn't effectively fulfill their roles or contribute to the program's success.

"We were so busy feeling grateful for their involvement that their involvement alone became the focus and our goal, and the volunteers knew it," he said. "They were doing us a favor by being involved, but they weren't accomplishing important fund-raising work. Volunteers weren't soliciting gifts, and they weren't raising annual giving dollars."

Realizing volunteers had little control over the problem, Loosigian decided on his own to change things. "I don't believe fund raising is a democratic process," he said.

In FY 2002, Exeter became the first secondary school to raise \$5 million in annual gifts in a single year. The school's reputation for excellence, combined with an annual giving program that carefully and deliberately established a culture of commitment, has produced volunteers who often ask to be involved and devote significant amounts of time helping the program reach its goals.

#### AFFECTION AND ACCOUNTABILITY

Although many institutions might balk before demanding greater accountability from volunteers, Loosigian saw both a need and an opportunity to change things. "The academy has always stood for excellence, and I knew our volunteers felt pride in their continuing involvement. I thought the academy had the right and the ability to expect a higher standard," he said.

Loosigian's mantra became, "When you think of Exeter, think of business." He described the annual giving program to potential volunteers as a business venture of Exeter Academy, and he made it his business to set expectations and ground rules in an upfront, businesslike way. "They know

PHOTOGRAPH BY PETER GRIFITH/AMSTERDAM

that the program will be run in a first-class manner, and we go out of our way to recognize success and hard work."

Along with all this volunteer accountability, Exeter adds a liberal dose of affection. Loosigian knows, after all, that at the end of the day, the volunteers in his business are, well, volunteers. He realized that he was unintentionally training volunteers to not return phone calls from him because they assumed he called only with bad news or complaints. He learned to follow a very simple (if inexact) formula for volunteer conversations: "Equal parts good news and bad news—we want to stay out of the if-he's-calling-me-there-must-be-a-problem trap."

Loosigian now goes out of his way to contact volunteers with positive feedback. He or other staff at Exeter might, for example, call a class agent with the positive news that some of the agent's classmates attended a recent Exeter function. Or he will call to inform an agent that a recent phonathon or other class fund-raising event attracted 10 new donors, thereby adding to the class agent's fund-raising total. "I'll call to tell them a fund-raising letter they wrote is terrific," Loosigian said. "The simple act of

engaging [volunteers] in ongoing communication, in good and bad times, makes a huge difference in elevating their enthusiasm and their performance."

#### GETTING DOWN TO BUSINESS

The businesslike philosophy is apparent in program training materials that outline specific class fund-raising goals and even more specific volunteer job requirements. Although volunteers receive a complete volunteer training manual, they also can now access much of the information online via the Exeter Web site, [www.exeter.edu](http://www.exeter.edu).

The Exonian class agent job description lists these requirements:

- solicit classmates' gifts to the Exeter Annual Giving Fund with calls, letters, and e-mails;
- participate in local phonathons conducted by volunteers at locations around the country each year;
- thank donor classmates with personal notes in addition to Exeter's own gift acknowledgements;
- encourage classmates to get involved in reunions and other Exeter events and volunteer opportunities; and

- communicate regularly with the Exeter annual giving office about solicitation progress, address updates, and other information regarding class giving prospects.

The job description also mentions a required annual on-campus weekend of training and best-practice sharing among volunteers. The get-together reinforces the program's roll-up-your-sleeves-and-get-to-work culture, with some class agents themselves serving as star experts. Loosigian's favorite tips include:

- the time-honored (although admittedly low-tech) example of the dog-eared class roster that Joe Bain, class agent for the Class of '41, proudly totes around. Bain devotes each page of the roster to a classmate, and each entry includes extensive notes from his contacts with the classmate and family members and others close to the classmate. Bain even pastes updates from class notes onto the classmate's page.
- the habit Kurt Perion, Class of '69, has of adding a personal touch to all mailings to classmates—even mass e-mailings. He'll take the extra time to cut and paste the body of an e-mail form letter into a message that contains a personal note for each classmate.

The University of Virginia looks to independent schools for reunion giving lessons

## BACK to CLASS

For independent schools such as Phillips Exeter Academy, a reunion giving program often is the centerpiece of their annual giving efforts, with competition among classes each year inspiring volunteer involvement, increased participation, and record-breaking fund raising. When a public university embraces reunion giving, however, it's news.

Public universities typically have large classes that can diminish feelings of alumni class identity and undermine attempts at reunion-based giving. Instead, these institutions often have colleges and other units with strong identities that they emphasize through college- and department-based annual giving structures, even while the alumni office

plans homecoming and reunion programs based on class year.

Historically, the University of Virginia organized its annual giving according to this structure. Because UVA always has enjoyed strong alumni affinity, reunion attendance was often good, but it lacked any strong connection with alumni giving.

Since 1999, however,

UVA has held an annual spring reunion modeled on the independent school five-year-anniversary-class format. During the reunion program's "high season," the central university staff recruits volunteers and schedules volunteer training weekends. The alumni association recruits the overall reunion chair, who focuses on programming activities. The annual giving

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— WAYNE LOOSIGIAN

• the secret of success of many high-performing classes with multiple class agents, the regularly scheduled conference calls they hold to update each agent's progress. The agents manage the calls themselves and don't always involve Loosigian.

If these sound like best-practice examples for a sales staff, it's no accident—it's just good business.

When Loosigian initially redefined the roles of annual fund volunteers and the goals they had to meet, the culture shift produced a few volunteer casualties. But he found that being upfront and clear went a long way toward minimizing potential hard feelings.

"I've had volunteers who intended to do a good job but didn't commit the time we agreed to," he said. "More often than not, they would come to me disappointed and acknowledge that they weren't doing the job. We would disengage quietly, and I'd let them know that there were other ways for them to be involved."

#### A SELECT GROUP

Although grateful for the participation of all alumni volunteers, Loosigian recognized that a correlation usually existed between

the size of gift being solicited and the amount of time required for cultivation and solicitation. "Some of our higher end donors needed more cultivation than what the typical class agent was able to provide. The agents were being effective with most of their classmates—95 percent of the class." That other five percent of the class, however, needed more focused attention than even the most accomplished class agent could provide. "We just needed another way to cultivate the major prospects," he said.

In seeking another way, Loosigian looked again to his Exonian volunteers by forming a new leadership-giving group, the 1781 Society, to commemorate the school's founding year. Membership in the 1781 Society requires a minimum annual gift of \$1,781. Loosigian identified 42 volunteer solicitors who primarily would solicit major prospects for society membership each year. Although there might be more than 700 potential 1781 Society prospects in any

given year, each volunteer receives a relatively light load of 10 prospects. As a result, volunteer solicitors can spend a manageable amount of time cultivating each of them.

Any prospects not assigned to a volunteer gift solicitor may, at Loosigian's discretion, hear from an experienced Exeter phonathon volunteer or a staff member, or in the case of prospects who graduated before the early 1940s, simply receive a personal letter. Loosigian explained that Exeter alumni who graduated before 1940 typically are more responsive to letters than to phone calls.

The creation of the 1781 Society and its volunteers was "another culture shift that some of our volunteers struggled with, no question," Loosigian said. "Class agents looked wounded when I told them that other volunteers would contact some of their classmates. Over time, though, they came to accept and embrace it." He credits the creation of the 1781 Society with helping the annual giving program achieve its record \$5 million in gifts in 2002.

staff recruits each class's reunion-giving chair, and volunteers put together reunion-giving subcommittees. In considering volunteers, the annual giving staff looks at individuals' past involvement and volunteer time availability as well as their giving capacity and ability to help expand the annual giving network by engaging new volunteers from their peer group.

The campus has introduced lots of independent-school-like reunion giving competition as well, including recognition listings for top class fund-raising performance. The alumni association offers a trophy for highest class reunion attendance, and the annual giving program presents awards for highest total giving and highest total class participation. The

program has helped generate a competitive class spirit the university didn't actively cultivate in its students. Alumni may still lack strong class affiliations, but they pull together and volunteer in response to the university's reunion challenge.

Class giving participation during reunions has increased, and reunion attendance has increased

as well. But the program's real strength lies in attracting unusually large gifts from reunion alumni. Overall reunion giving has grown more than 70 percent, from \$3.9 million in the program's first year (1999) to \$5.6 million in 2002.

In one departure from the independent school model, the UVA reunion-giving program continues to

solicit alumni on behalf of the school from which they graduated. An annual report lists reunion class donors by the school they attended. In this way, the university can retain a school-based emphasis while using class reunion energy as a five-year tool to increase participation and overall fund raising.—RB

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### A CAMPUS CREATES ITS OWN CULTURE

Phillips Exeter fund raising took off when the staff decided to raise its expectations of volunteers. Regarding advancement officers at institutions that have difficulty motivating volunteers, Loosigian wonders if they're focusing on the real problems.

"I see other institutions that have volunteer structures, but I don't see all of them managing those structures as aggressively as they should," he said. "They're too content with having 'bodies' on the committee," he said, and they're not paying enough attention to the amount of time and work volunteers offer—or the results.

In contrast, Exeter's volunteer management strategies are just one part of a larger class-based fund-raising culture. Frequent alumni publications and events keep alumni thinking about Exeter in general and their former classmates in particular. Fully two-thirds of the quarterly *Exeter Bulletin* consists of class notes written by other class volunteers. It's easy to appreciate the strong foundations Exeter has built for sustaining Exonian affinity and instilling the philanthropic culture.

Few alumni wake up in the morning hoping that their alma mater will call to recruit them for volunteer fund-raising jobs. But the annual giving program staff should not conclude that alumni don't want to participate. The challenge is to create a culture that invites alumni involvement, a culture that encourages volunteer satisfaction and fund-raising success. Whether your institution uses class-based volunteers or some other kind of organization, Wayne Loosigian's volunteer management lesson is clear: Get down to business. ■

Robert A. Burdinski is an annual giving consultant based in Minneapolis. CURRENTS adapted this article from his new CASE book, *Innovations in Annual Giving*. For details on the book, go to [www.case.org/books/hotpress/cfm](http://www.case.org/books/hotpress/cfm).