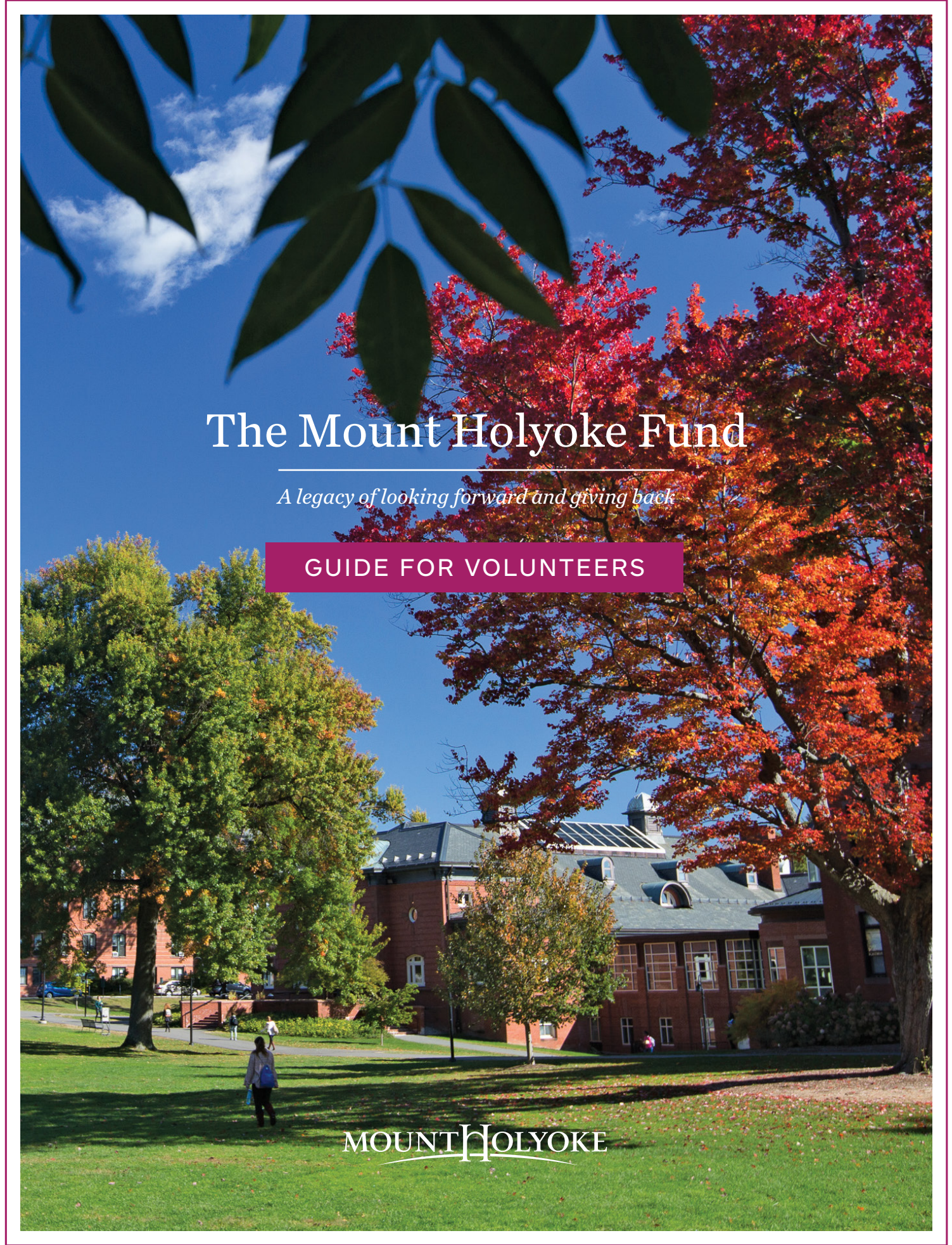




The Mount Holyoke Fund

A legacy of looking forward and giving back

GUIDE FOR VOLUNTEERS

MOUNT HOLYOKE

TABLE of CONTENTS

Being a volunteer: three easy steps	2
Class Volunteer Roles	3
Additional Volunteer Roles	4
Volunteer Committees.....	4
Why give to The Mount Holyoke Fund?.....	4
Top five reasons to give to Mount Holyoke	5
Where can alums give?	5
When is the time to give?.....	7
How can alums make a gift?.....	7
How can alums increase the impact of their gift?.....	8
Who belongs to our giving societies?.....	9
Making the ask	10
Having a helpful conversation	11
Responding to concerns	12
Additional tools.....	13
Glossary.....	14



Thank you for being a part of The Mount Holyoke Fund volunteer team. Together, alums like you help build on our strong legacy to go forth, attempt and accomplish great things.

From the class of 1950 to our most recent graduates, our Mount Holyoke Fund volunteer team unites more than 730 alums with the shared goal of giving back to ensure we can go forward. Collectively, we are building bonds between people and across experiences for lifelong impact. Throughout the year, Mount Holyoke Fund staff members partner with our volunteers and volunteer committees to drive support of The Mount Holyoke Fund. We are available to provide guidance and resources as you connect your classmates to MHC and encourage support of the College.

Thank you again for your energy and generosity. We're looking forward to working with you to create an even better Mount Holyoke — and a better world.

THE MOUNT HOLYOKE FUND

BEING A VOLUNTEER: THREE EASY STEPS

Mount Holyoke Fund volunteers are key members of The Mount Holyoke Fund team. Alums 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 classmates connected to one another and to 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.
- Say thank you!

Share information you learn from your outreach with your staff liaison.



CLASS 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 to develop a strategic plan for raising Cornerstone gifts of \$1,837 or more from classmates. Leadership gifts make up approximately 75% 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.

Mary Lyon Society Class Chair

The Mary Lyon Society (MLS) Class Chair helps to promote the *Mary Lyon Society* by working with the gift planning staff to share information about the Mary Lyon Society with classmates, serve as a liaison between the class and *the office of gift planning*, write a thank you note to welcome new MLS members in the class and report the number of MLS members and the five year impact of the MLS on the class totals at Reunion.



ADDITIONAL VOLUNTEER ROLES

Regional MHF Representative

Regional MHF Representatives connect with alums who live in their region to engage with alums who might not be as connected with their class fundraising efforts.

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. Alums from all decades serve on the committee.

Beyond the 50th Committee

Term length: two 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 that 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. 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.

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.

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 and 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** through student organizations and varsity and club sports.



WHERE CAN ALUMS GIVE?

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

Academic Enrichment

Support academic departments, curriculum development, instructional programs and the academic centers.

Accessibility

Help provide appropriate, effective and progressive accommodations for students while shaping campus conversation around the concepts of accessibility, ability and disability through the work of Disability Services.

Athletics

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

Campus Renewal

Help maintain and preserve our historic buildings and grounds and protect the natural characteristics of campus.

Community and Belonging

Support things like our MoZone Peer Education Program, our five cultural centers or our Intergroup Dialogue program that seek to help those in our campus community and beyond communicate across differences.

Diversity, Equity and Inclusion

Support projects and initiatives — such as the annual community-wide Building on Our Momentum Community Day and the Trailblazers of Color Leadership Conference — 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.

MHC Forward Fund

Provide critical, flexible resources that enable President Holley and College leadership to defend academic freedom, support students affected by global and domestic pressures, and sustain Mount Holyoke's bold, inclusive mission.

Mental Health and Well-Being

Help provide educational and life skill developmental opportunities via our Be Well programs and support the Mount Holyoke Counseling Services to help students as they navigate challenges at MHC, from stress, anxiety and depression to cultivating healthy relationships and overcoming barriers to reaching their goals.

Residence Hall Renewal

Help renew the 18 historic residence halls and support essential renovations and maintenance, including accessibility and sustainability updates to meet the evolving needs of our diverse community while honoring the College's architectural legacy

Scholarships

Honor the College's long tradition of providing scholarship aid to exceptional students from all economic circumstances. Select the general scholarship destination or choose to support **First Generation, International or Frances Perkins scholars** specifically. An annual gift of \$10,000 or more, or a multi-year commitment of \$5,000 each for the next four to five fiscal years directed to **The Mount Holyoke Fund Scholars Program** provides a 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.

Student Safety Net Fund

Provide assistance to currently enrolled first generation and low income (FGLI) students whose personal circumstances may require urgent additional financial help in order to access living necessities, technology or other items to support their academic experience, helping to offset costs for essential needs such as food, shelter or internet access.

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.

Visual and Performing Arts

Support music ensembles, dance companies, theater productions, art classes and more which provide opportunities for learning, expression and leadership for students from all backgrounds.

Wherever Mount Holyoke needs it most

WHEN IS THE TIME TO GIVE?

The fiscal year runs from July 1 to June 30. By making your gift early in the fiscal year, you help the College save resources and plan for the year.

HOW CAN ALUMS MAKE A GIFT?

Online

mtholyoke.edu/go/mhcgive

PayPal

mtholyoke.edu/giving/ways2give

Venmo

[@mountholyokefund1837](https://venmo.com/@mountholyokefund1837)

(be sure to include your name, class year and email address)

Phone

800-642-4483

Mail

Office of Development
Mount Holyoke College
PO Box 889
South Hadley, MA 01075-0889

Credit cards

Visa, MasterCard, American Express and Discover accepted

Checks

Made payable to
Mount Holyoke College

Mount Holyoke Tax ID#

04-2103578 “Trustees of Mount Holyoke College”

HOW CAN ALUMS 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 coordinator, 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 gift coordinator, at 413-538-2031 or campbelm@mtholyoke.edu.

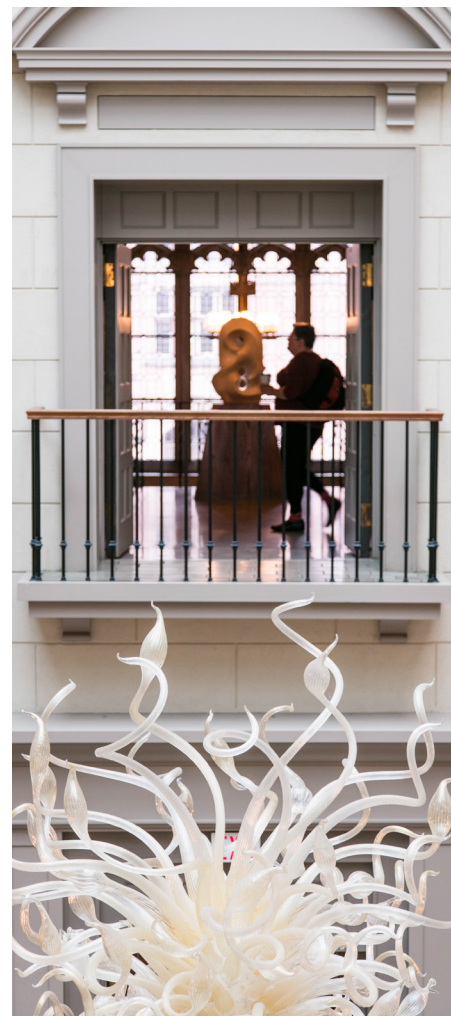
Qualified charitable distribution (QCD) from an Individual Retirement Account (IRA)

If you are at least 70 ½ years old, you can make an annual tax-free gift of any amount up to \$105,000 in 2024 from a traditional IRA. (Other retirement plans, such as 401(k)s and 403(b)s, are not eligible.) QCDs must come directly from the IRA administrator to Mount Holyoke College. The benefits of making a QCD from an IRA include:

- If you are age 73 or older and must take your required minimum distribution (RMD), a QCD can satisfy your RMD without increasing your income taxes.
- QCDs are not considered income by the IRS, so it may provide beneficial tax implications.

For more information, please visit the College's Gift Planning website: giftplanning.mtholyoke.edu/ira-charitable-rollover.

Information contained here should not be considered legal, accounting or other professional advice. Please always urge donors to consult with their own advisors.



Creative, flexible giving options

Planned giving provides a variety 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

The Cornerstone Society recognizes donors who make gifts of \$1,837 or more to Mount Holyoke each year. Recent alum Cornerstone giving levels begin at \$100 for first-year graduates. Visit mtholyoke.edu/giving/cornerstone_society for more information.

The Laurel Chain Society

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. Alums 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 and to see a list of members.

The Mary Lyon Society

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.





MAKING THE ASK

Step 1: Prepare

- Make your own gift first and reflect on why you support Mount Holyoke.
- 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 (e.g., 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 "Having a helpful conversation" below).
- 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.

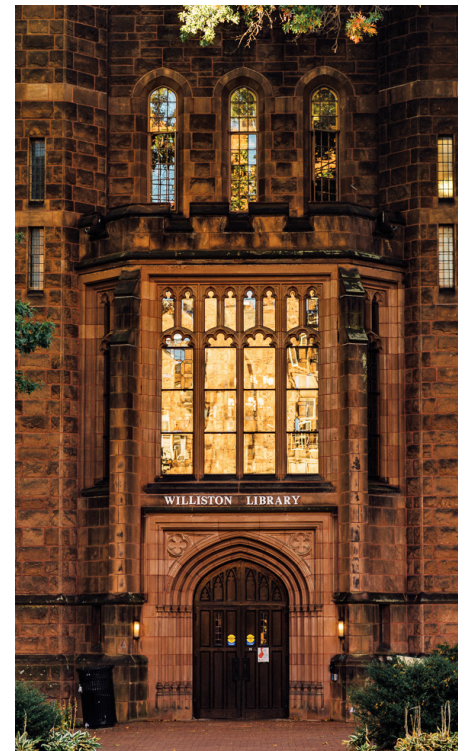
Mount Holyoke is always evolving to meet the demands of our ever-changing world. Sometimes, these changes can make alums feel less connected to the College. Identifying shared goals, such as maintaining Mount Holyoke's standing globally, or a shared identity as members of the crew team can help remind 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. 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 may have questions about something that you haven't heard of, or they may 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 alums 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 alum 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% 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 alums, families and friends.

Objections: I had a bad experience at Mount Holyoke.

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





ADDITIONAL TOOLS

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

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, alum engagement and strategic solicitation.

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.

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 mail or email.

Ask amount

A specific gift amount that alums are asked to give during solicitations.

Cornerstone gifts

A gift of \$1,837 or more to the College. Recent alum 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 from July 1 to June 30.

Gift destination

Our gift destinations are designations within The Mount Holyoke Fund that support the areas of greatest need at the College.

Leadership Giving Officers

These staff members work with alums who are capable of making a gift of \$100,000 or more to the College. Leadership Giving Officers work regionally and focus on connecting alums 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 an annual gift of \$10,000+ or a multi-year pledge of \$5,000+ for four to five years to The Mount Holyoke Fund Scholars program. The donor receives a letter from the scholarship recipient.

Other gift (as appears in volunteer reports)

A gift to any College fund other than The Mount Holyoke Fund.

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.

