



CLASS AGENT MANUAL  
2009–2010

OFFICE OF ANNUAL GIVING  
ALUMNI/AE AFFAIRS AND DEVELOPMENT



September 2009

Dear Exeter Class Agent,

It's time for the 2009-2010 Annual Fund campaign to begin!

Last year was a challenging year. The Annual Giving Fund fell short of its dollar and participation goals for the first time in recent history. Nevertheless, the \$6.7 M that was raised was the fifth largest total in the 87-year history of Exeter's Annual Giving Fund. And Exeter's 48% alumni/ae participation is a benchmark that few schools attain. These achievements would not be possible without the dedication and talent of our Class Agents.

In our efforts to be good stewards of the environment we are encouraging all Class Agents to use VOR (volunteer on-line reports). The biographical and giving information accessible through VOR is updated daily, thus making it much easier to stay informed about your classmates. In addition, we are providing electronically the Class Agent Manual. The manual contains important information about the Annual Giving Fund and about your role as Class Agent. Whether you are a new volunteer or a seasoned veteran, we encourage you to review this year's manual.

Thank you for volunteering your time and talent to the Academy. Your efforts throughout the year will greatly benefit today's Exeter students and faculty.

Sincerely,

**The Annual Giving Fund staff**

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# ANNUAL GIVING OFFICE

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Staff directory for Alumni/ae Affairs & Development:  
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Online volunteer resources:  
<http://phillips.exeter.edu/volunteering/Resources.html>

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The purpose of the Class Agent Manual is to provide a detailed overview of your volunteer role as a Class Agent, as well as to suggest ways in which the Annual Giving Office can support you in this important work for your class. The information is arranged in the sections listed on the right.

Our ambition, simply stated, is to conduct an annual giving campaign that is second to none in attracting a broad base of support from alumni/ae, parents, grandparents and friends.

With grateful thanks for your participation in this effort,

The Annual Giving Staff

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## ACADEMY MISSION STATEMENT

The founder of Phillips Exeter Academy defined its mission more than two centuries ago. “Above all,” John Phillips stated, “it is expected that the attention of instructors to the disposition of the minds and morals of the youth under their charge will exceed every other care; well considering that though goodness without knowledge is weak and feeble, yet knowledge without goodness is dangerous, and that both united form the noblest character, and lay the surest foundation of usefulness to mankind.”



Exeter today continues the commitment to unite knowledge and goodness. It seeks students who combine proven academic ability, intellectual curiosity and tenacity with decency and good character. At the Academy, exacting inquiry and thoughtful discourse foster the life of the mind, instruction and activity promote fitness and health, and the daily interactions of a residential school nurture integrity, empathy, and kindness. Because learning and growth at Exeter arise from each individual’s engagement with others, the richness of education here requires diversity in all its dimensions; students and faculty value the differences they bring to the community they share.

The challenges that students meet at Exeter and the support they receive have a common purpose: to stimulate their development as individuals and as members of society. Exeter seeks to graduate young people whose creativity and independence of thought sustain their continuing inquiry and reflection, whose interest in others and the world around them surpasses their self-concern, and whose passion for learning impels them beyond what they already know.

## YOUR ROLE AS CLASS

As a Class Agent you are the face of Exeter's Annual Giving Fund to your own classmates. Exeter alumni/ae may be asked to support the Academy in multiple ways. The following are a few distinctions regarding the Annual Fund in comparison to other solicitations:

- Gifts to the Annual Fund are for current, unrestricted use for some of Exeter's highest priorities
- The Annual Fund helps to meet the current needs of the Academy such as faculty and staff support, campus improvements and student life as well as many other important programs
- Support of the Annual Fund is encouraged from all alumni/ae, even if they are directing support to other areas of Exeter
- The Annual Fund provides roughly 8 percent of Exeter's operating budget each year

While there are many ways to support Exeter, your gift of time as a Class Agent is the most important. Exeter has an obligation to make the experience rewarding and to make good use of the time you so generously give.

### RESPONSIBILITIES OF THE CLASS AGENT:

- **Make your own gift or pledge to the Annual Giving Fund early and lead by example!**
- Attend Alumni/ae Council Weekend on Friday, September 25 & Saturday, September 26, 2009
- Solicit classmates for gifts to the Annual Giving Fund through written, verbal and electronic communications.
- Thank classmates who have contributed to the Annual Giving Fund. Although all donors receive an acknowledgment from the Academy, Class Agents should also write, call or email their own note of thanks to classmates
- Attend **phonathons** in your area AND recruit classmates to attend phonathons in their areas
- Maintain close communication about classmates with the Annual Giving office — including information about top prospects, (see Section 2--The1781 Society), address, telephone and e-mail changes for home and business, as well as births, deaths, marriages and general feelings about Exeter
- Encourage classmates to participate in **Exeter activities**, such as regional dinners, special events and visits to campus
- Encourage classmates to register for **ExieNet**, Exeter's online tools and services for alumni/ae

## RESPONSIBILITIES OF THE ANNUAL GIVING OFFICE:

- Arrange all mailings for distribution to Class Agents, including the preparation of all envelopes with postage and response mechanisms
- Send gift and pledge acknowledgments with notes of thanks to donors
- Organize **regional phonathons** across the country
- Coordinate conference calls for Class Agents
- Provide bi-monthly volunteer updates about your individual class progress, as well as timely news, figures and other information about the Annual Fund
- Supply calling cards to Class Agents upon request; please contact the Annual Giving office at (603) 777-3473 or [annualgiving@exeter.edu](mailto:annualgiving@exeter.edu)



No brochure or case statement can take the place of the personal contact you have with your fellow Exonians. **Your consistent contact with classmates is the single most persuasive factor in increasing both your class percentage of participation and overall giving.** When you thank consistent donors for their past support, you increase the likelihood that they will give again. When you reach out to classmates who give infrequently, you help them understand why their gift is important. When you listen to concerns or questions, you help your classmates learn more about the Exeter of today.

**After the endowment, the Annual Giving Fund is the only other significant source of revenue that can provide the “margin of excellence” that makes Exeter unique** — unless the school chose to rely on larger tuition increases, which would have a detrimental effect on students and families. Without the Fund, therefore, there would be fewer course selections, faculty salaries would not remain competitive, and students would have fewer resources at their disposal, whether it be library books or athletic equipment.

**This is the message we must convey: annual gifts, whether large or small, have true power. They are integral to Exeter’s character, and through the Annual Giving Fund, every Exonian can contribute in a real way to strengthening and enriching the school that means so much to us all.**

The success of the Annual Giving Fund would be impossible to achieve without your efforts. We thank you in advance for your belief in Exeter and for the time and energy you will spend on talking with and writing to your classmates.

## TIPS FOR SUCCESS

While the basic strategy and schedule have been outlined in this manual, there is significant room for creativity. Begin thinking about your individual class. Your initiative, leadership and commitment will determine the campaign's success.

- **Make your own gift or pledge early.**

As a Class Agent, you are setting the pace for the rest of your classmates. Also, it will make your job of asking for gifts much easier if you can say, "Join me in supporting Exeter."

- **Make contact with classmates early and often.**

Take advantage of any opportunity to connect with classmates throughout the year. Persistence with follow-up calls, emails & visits does make a difference. Waiting until the end of the fiscal year (June 30) creates more work and lost opportunity.

- **Attend conference calls.**

These calls are designed to provide you with answers to your questions and information you need to perform your duties as a Class Agent. It also provides a platform for you to share ideas with your fellow agents and discuss fund-raising strategies.

- **Personalize contacts.**

Classmates enjoy receiving personalized communications. Contact as many of your classmates as possible, by phone or through personal visits. Whenever you send an email or a letter, remember to personalize it!

- **Attend regional phonathons and recruit classmates to attend regional phonathons.**

Phonathons are a great way to make a number of contacts in one evening. The more classmates you recruit, the more successful the evening will be. [Click here](#) for additional phonathon information.

- **Conduct a virtual phonathon.**

Work with other Class Agents to conduct a virtual phonathon from home. A virtual phonathon is a phonathon conducted by classmates on the same evening from their own location rather than from one common location.

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## 1. Annual Giving at Exeter

- **Focus on participation rather than gift size.**

It is participation that Exeter values most. It guarantees the strength of the fund from year to year.

- **Use the Online Directory and Volunteer Online Reports (VOR).**

You can access up-to-date information on fellow Exonians through the Academy's [online directory](#). The directory is also a place to update us of any changes in your personal information. [VOR](#) provides immediate access to the fundraising status of your class.

- **Team effort.**

**Work as a team with your Annual Giving staff cohort.** They are available to assist you and answer any questions.



## THE CASE FOR ANNUAL GIVING

The Academy will always ensure that the oil bill is paid and that the lights stay on. Necessities such as these are non-negotiable elements in the operating budget. But the elements that contribute to Exeter's unique character and singular educational experience cannot be guaranteed without philanthropic support for the school.

Tuition has *never* covered the cost of an Exeter education. The Academy has relied on the Annual Giving Fund and draw from the endowment to bridge the gap between what is collected in tuition and what is spent to operate the school. Although we have a higher proportion of students on financial aid than any of our peer schools, this program is supported by dedicated endowment funds; even students paying full tuition cover only about 60 percent of the cost of their Exeter experience.

The size and flexibility of the Annual Giving Fund ensure that there are adequate resources every year to sustain Exeter's distinctive margin of excellence, regardless of external economic conditions. The Academy relies on gifts of all sizes from alumni/ae and parents to keep the Annual Giving Fund strong from year to year and to protect the programs, the places and the people that Exeter has so thoughtfully invested in over the years. For all these reasons, the fund is and will remain an annual priority for Exeter.

## THE POWER TO CHOOSE EXCELLENCE

The Annual Giving Fund gives Exeter the financial resources and flexibility to develop and sustain programs that make it a truly exceptional place to teach and learn. Without the fund, Exeter would be unable to offer, or would be forced to curtail, programs and features such as these:

- The 12:1 student-teacher ratio in the classroom (and 5:1 ratio on campus) that makes the Harkness table, and those around it, really work.
- An admission program that travels widely and recruits actively — seeking out students who may never have heard of Exeter from new regions of the country and world.
- A competitive athletics program and broad physical education program that cater to both novice and nationally ranked athletes and include 20 interscholastic sports and 60 teams.
- A landmark library with nearly 160,000 volumes, a growing collection of digital media, extensive archives and a team of reference librarians to cover the help desk whenever the Library is open, including at night.
- Professional development resources for teachers to research and

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## 1. Annual Giving at Exeter



develop new courses such as Screen-writing, New China, Old China, Earth Systems and Quantum Mechanics.

- A curriculum that never “runs out” because departments will offer specially tailored classes or independent studies to any student if necessary.
- Distinctive off-campus programs such as the Washington Intern Program, founded in 1966, which allows a select group of Exeter students to spend a term working as interns in House and Senate offices and federal agencies. It is one of Capitol Hill’s only residential academic internships open to high school students and Exeter’s most popular off-campus program.
- A student-run radio station, WPEA, 90.5 FM., which has been in existence since 1964 and claims to be the oldest continuously broadcasting high school radio station in America. Recently acquired technology allows Exeter DJs to produce and broadcast as never before.
- Programs across disciplines that bring visiting artists, scholars and authors to campus to work directly with students. In the last few years, for example, the drama program has brought to Exeter some of the biggest names in the business, including author and Academy Award-winning screenwriter John Irving ’61 and Tony Award-winning composer and lyricist Adam Guettel ’83.
- A suite of environmentally focused science courses, student clubs and a sustainability coordinator position on the faculty that not only raise awareness of a broad range of social and environmental issues on campus but also inspire creative student projects such as manufacturing bio-diesel fuel from cooking oil, a student-run organic garden and advocating for carbon-reduction goals on campus.
- Activities of the Exeter Social Service Organization (ESSO), which this year involves more students than ever before — over 750 students in 100 service-oriented clubs. The organization recently refined its mission in order to focus on direct service in the Exeter community, allowing students to see the ongoing results of their service first hand.
- Outreach of the Grainger Observatory, which is not only one of the finest secondary-school astronomy facilities in the United States, but which also (in June 2007) hosted the first ever Grainger Astronomy Conference for secondary-school astronomy teachers. The free, week-long conference, organized by Astronomy Instructor John Blackwell, attracted teachers from across the country who want to collaborate in “an effort to move astronomy to a forefront in the academic world.” Grainger boasts three observatory domes, one of which houses a robotic telescope; digital imaging capability; and a heliostat.

## SUPPORTING PEOPLE

Exeter can seek out and recruit the very best teachers, students and staff only because Exonians support the school so generously each year. The Annual Giving Fund has a direct bearing on Exeter's ability to be the school of choice for top candidates. Approximately 60 percent of Exeter's annual budget is devoted to Exeter people, in the form of salaries and benefits. In addition, Exeter awards a substantial amount of student financial aid each year: \$15.9 million in 2009–10. Just a few of the many people Exeter has been fortunate to attract to its campus include:

- Tara Burton, a scholar and writer who has won numerous awards for fiction and poetry, including a Lamont Younger Poets prize in 2006. Burton spent the summer of 2006 as an intern at the Emerson Institute recreating and studying the 1833 European travels and findings of Ralph Waldo Emerson. Her journal, *Emerson in Europe*, was later published by the Institute alongside Emerson's own journal of his travels.
- Curtis Thomas, a bright student, and a dedicated dancer, actor and choreographer from New Orleans who came to Exeter unexpectedly in the wake of Hurricane Katrina. A frequent participant in a wide range of campus productions, Thomas turned down a place at a prestigious arts academy in order to stay at Exeter. He was selected to be a proctor in Soule Hall as an upper, a year earlier than is customary.
- Lizzie and Cathy McDermott, internationally ranked fencers who took up rowing when they came to Exeter and were members of the girls varsity crew that won all three of their races at the Reading amateur regatta in England last June. They both attended Exeter's term abroad at Ballytobin, a Camphill community in Ireland for the severely disabled.
- John Blackwell, astronomy instructor and director of Grainger Observatory, who, in the fall of 2006, took three Astronomy 999 students to the Kitt Peak National Observatory in Arizona when their proposal to continue their studies of U Pegasi, a binary eclipsing star system, was accepted by that facility. The students worked closely with a professional astronomer at the observatory to gather data, which they brought back to Exeter for analysis. Blackwell and his students regularly collaborate with astronomers around the country.
- Gwynneth Coogan '83, Smith Family Instructor in Mathematics, who holds a Ph.D. in mathematics from the University of Colorado at Boulder and completed a post-doctoral fellowship at the University of Wisconsin at Madison before returning to Exeter in the fall of 2002. A former Olympic runner, Coogan also coaches the Exeter Girls Cross Country Team and teaches in the Exeter Mathematics Institute (EMI), a program that takes Exeter mathematics instructors to urban areas to work with public-school teachers during the summer.

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## 1. Annual Giving at Exeter

- Ralph Sneed, the Exeter English instructor whose poem, “Evidence of the Journey,” won Poetry magazine’s prestigious Friends of Literature prize in 2004 and whose first book of poems (also titled *Evidence of the Journey*) was published in spring 2007.
- Rich Aaronian, Harlan Page Amen Professor of Science, and Christopher Matlack, who holds the Lee C. Bradley III Class of 1943 Teaching Chair in Science, who together organized a 2007 March-break study trip to the Amazon with 12 Academy seniors and uppers.



### **EXETER’S FINANCES: THE BIG PICTURE**

Understanding Exeter’s finances is the first step to understanding its need for financial support. Within the larger picture of Exeter’s finances, the Annual Giving Fund is the only source of immediately available, flexible funds besides tuition.

#### **How Does Exeter Cover its Costs?**

Quite simply, Exeter could not operate without the generosity of its alumni/ae, parents and friends. At this time, 64 percent of its yearly budget comes from gifts in some form: either the endowment or the Annual Giving Fund.

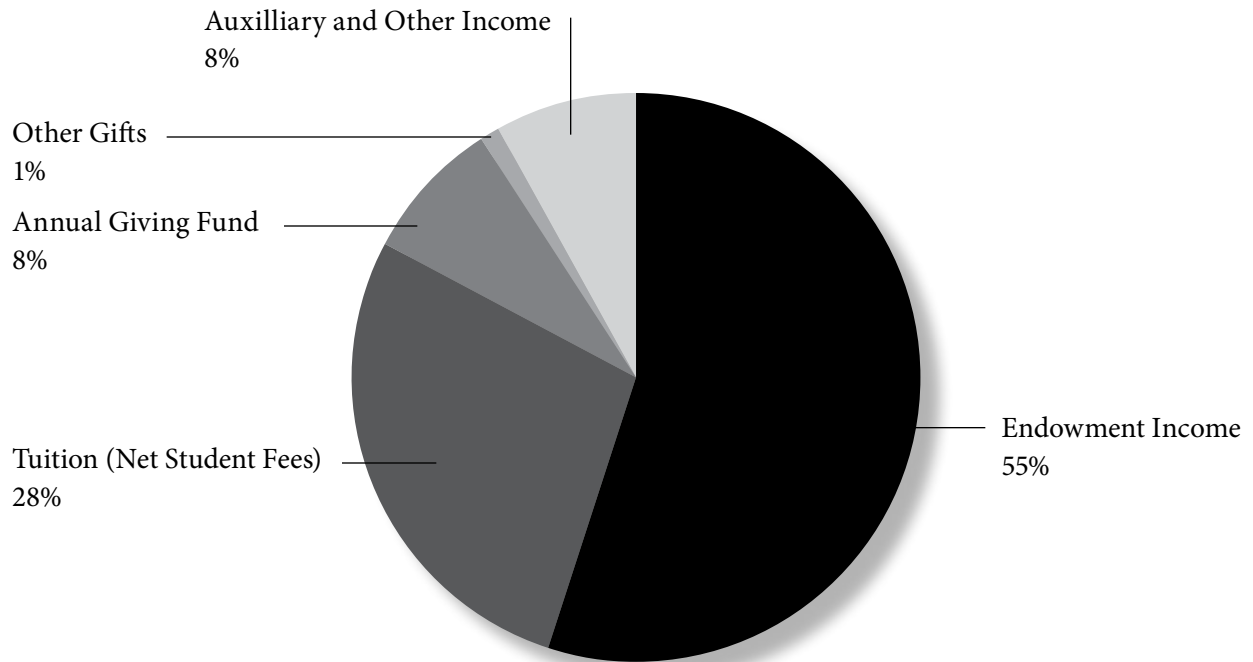
As a rule, schools have three main sources of annual income: tuition, earnings from an endowment (if they are fortunate enough to have one) and gifts. Some schools also earn a small income from side enterprises, such as bookstores or summer programs. However, because schools are focused on teaching, and not on profit-making ventures, most depend on these three primary sources of income.

This year, Exeter will cover 28 percent of its costs with tuition. Because of wide support from the Annual Giving Fund and the endowment, the Academy has been able to limit tuition increases in recent years and keep this figure comparatively low.

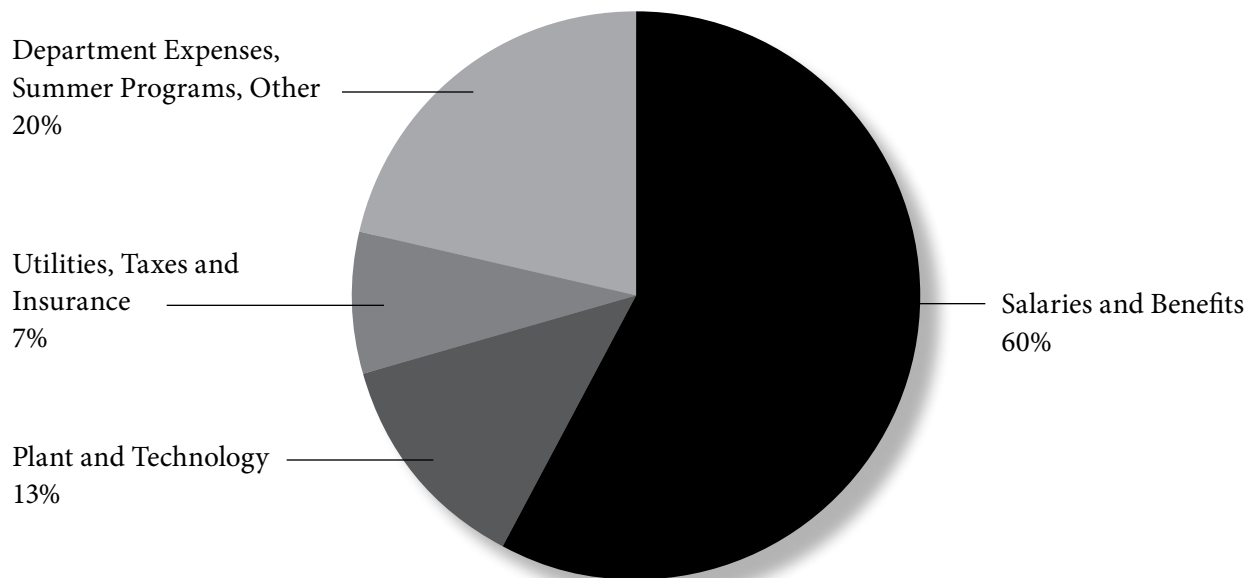
The Exeter endowment currently provides about 55 percent of revenue each year. This figure demonstrates just how powerful gifts can be. Without the donors who made gifts to endowment over the past 150 years, students today would be paying much higher tuition.

The same is true of the Annual Giving Fund, which will provide approximately 8 percent of the budget this year. The Annual Giving Fund has a direct bearing on the quality of an Exeter education and the price of tuition. Because there are restrictions on how most of the endowment can be used, the Annual Giving Fund is the highest financial priority of the Academy each year.

## ANNUAL BUDGET 2009-10: INCOME



## ANNUAL BUDGET 2009-10: EXPENSES



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## 1. Annual Giving at Exeter

### **What is the Exeter endowment?**

Exeter's endowment is actually a collection of approximately 1,400 individual funds, pooled and invested together, much like a mutual fund. The purpose of the endowment is to generate annual income that can be used today, next year, and 100 or 200 years from now to run the Academy. The financial goal of the endowment is to be predictable — to provide roughly the same level of income each year, while also growing to keep pace with inflation.

### **The endowment is huge — why can't it pay all of Exeter's costs?**

Many people assume that the Exeter endowment is like a checkbook: we should use it to cover any costs at any time. In reality, there are rules Exeter must follow, laid down by each donor who makes a gift to the endowment.

Most donors create their endowment funds for specific purposes. Exeter is both legally and morally bound to use each fund as the donor wished. For example, if a donor created a teaching fund to support the history department, the Academy cannot use this fund for any other purpose, no matter how worthy. The majority of the Exeter endowment is restricted in this way.

Furthermore, only a small portion of the endowment can be spent in any given year. The trustees employ a strict spending policy that preserves the size of the endowment for the future. Donors support the endowment because they know that their funds will be invested prudently and continue to exist next year and for hundreds of years to come. They expect their gifts to be protected and to create a steady income for the school year after year.

### **If tuition covers roughly 28 percent of the costs, and the endowment provides roughly 55 percent, how does Exeter fill the gap?**

Exeter's top financial priority every year is the Annual Giving Fund. It covers approximately 8 percent of the costs, and it is invaluable because it is substantial and flexible. Nearly 10,000 alumni/ae, parents and friends banded together last year to contribute \$6.7 million through the Annual Giving Fund. The power of that many Exonians coming together, with gifts of every size, is tremendous. It would take roughly \$185 million in endowment to generate equivalent income each year.

### **Why does an Exeter education cost so much?**

Exeter's costs are high because it is a people-intensive enterprise. The 12:1 student-teacher ratio at the Harkness table equals a substantial line item for salaries and benefits. In addition, a school like Exeter needs more than just teachers to function. For example, dining hall workers serve

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## 1. Annual Giving at Exeter

three meals a day, seven days a week; custodial staff keep 25 dormitories running. A team of reference librarians staffs the reference desk whenever the Library is open. Sixty interscholastic teams across 20 different sports require coaching. One thousand student computers and a networked campus need IT specialists. Most important, the entire enterprise needs the best students from every walk of life. Approximately 60 percent of Exeter's annual budget is devoted to Exeter people, in the form of salaries and benefits. In addition, Exeter awards a substantial amount of financial aid each year: \$15.9 million (tuition and other grants) in 2009-10.

Costs also grow because knowledge continually expands. When new fields of inquiry demand the addition of computer science, Arabic or genetics, the Academy does not discontinue Latin, calculus or beginning biology. Growth in teaching means growth in teachers, books, equipment, technology, training and even, over time, facilities. With discipline, Exeter's budget must grow, because the alternative is to stagnate and eventually lose relevance.

### **Does all this giving really benefit the students?**

If you were to divide the total cost of running the school by the number of students, the cost per student would equal approximately \$68,000 for 2009–10. This year, however, Exeter charges a fee of \$38,720 for boarding students and a fee of \$29,920 for day students. Thus, every student, regardless of whether he or she receives financial aid, actually receives a substantial subsidy made possible through our endowment and robust Annual Giving Fund. Exeter's financial aid program provides an even greater subsidy to 48 percent of the student body this year. The average award for 2009-10 is \$32,282 per boarding student. Quite simply, none of this would be possible without gifts to the endowment and to the Annual Giving Fund.

### **The numbers are all so big. Do small gifts really make a difference?**

They really do. In fact, more than a quarter of gifts made to Exeter's Annual Giving Fund are gifts of \$100 or less, and yet they account for hundreds of thousands of dollars raised each year. It would take millions of dollars of endowment to generate that amount for the operating budget. The absence of those gifts would certainly have a negative impact on Exeter students and faculty.

## METHODS OF GIVING

Phillips Exeter Academy can accept donations through various methods during our fiscal year of **July 1 to June 30**. Listed below are the most common ways to make a gift to Exeter. If you do not see the information you need, please contact our office for more detailed explanations.

**Gifts must be made on or before December 31 to receive 2009 tax credit and, on or before June 30 to receive fiscal year 2009–10 credit.**

### ONLINE

Since online giving to Phillips Exeter Academy became available seven years ago, increasing numbers of donors are taking advantage of this secure and fast method for making a donation to the Annual Fund. Between July 2003 and June 2004, 1,583 gifts were made online totaling \$379,970. During last year's campaign, July 2008 to June 2009, Exeter saw a dramatic increase in online donations with 2,611 gifts totaling \$931,627.

From an administrative point of view, online giving saves staff time, paper, and postage — ensuring that each gift goes just a little further. For donors, it's an easy and efficient way to give, using a major credit card as the payment method. For volunteers, it's an easy way to encourage gifts without having to produce as many hand-written notes. Online giving has also been popular with young alumni/ae and those based overseas. To make an online donation, go to: <http://phillips.exeter.edu>. This is a fully secure site and, just as with paper transactions, your personal information is held in the strictest confidence.

### CREDIT CARDS

The use of **Visa, MasterCard, American Express, or Discover** for making contributions to Exeter saves the Academy time and money that would otherwise be required to send pledge reminders. For this reason, Class Agents are urged to promote credit card use when soliciting classmates.

When taking a credit card donation, please record the following information (or contact the Annual Giving Office and we will follow up to get the necessary information from the donor):

- **credit card type** (Visa, MasterCard, American Express, Discover), account number and expiration date
- **security code**: the last *three* digits located on the back of your MasterCard, Visa, or Discover card, or the *four* digit code printed on the front of your American Express card. (Our merchant account requires us to collect this information. Doing so saves the Academy time and money in processing gifts.)
- **credit card billing address**
- the **amount** and **designation** (i.e. the Annual Giving Fund) of the donation
- the **name and class of the donor** (the name should be recorded as it appears on the card)

## 1. Annual Giving at Exeter

### Scheduling a Credit Card Gift

Donors have two options for scheduling gifts on Visa, MasterCard, American Express or Discover credit cards. They can schedule a monthly charge (\$10 minimum) to their credit card, beginning and ending on specified dates, or they can schedule a one-time charge in a future month. Charges are made in the middle of each month; specific days cannot be scheduled. Please contact the Annual Giving Office to arrange scheduled charges: (603) 777-3473 or 800-828-4325 x3473.

These are easy and efficient ways to make a commitment to the Annual Giving Fund, and scheduling monthly gifts may make it possible for donors to make larger gifts than they have been able to make in the past.



### CASH AND CHECKS

Another method of giving to Exeter is via cash or check. However, we do **not** recommend that you send cash using any postal service or courier. Please instruct donors to make all checks payable to *Phillips Exeter Academy* — no matter what the designation of the gift and send their checks to:

**Gift Recording**  
**Nathaniel Gilman Alumni/ae House**  
**Phillips Exeter Academy**  
**20 Main Street**  
**Exeter, NH 03833-2460**

### SECURITIES

If a donor is considering a gift to Exeter, appreciated stocks or mutual fund shares offer many advantages over gifts of cash. These benefits include:

- a tax deduction equal to the full fair market value of the stock
- the avoidance of a capital gains tax on the appreciated value of securities (held longer than one year and one day)
- an increased capacity to give

### METHODS OF TRANSFER

#### • Electronic Transfer

The most popular and efficient way to give securities to Exeter is by electronic transfer. If the stock is held by a broker, the donor must notify the broker to make a gift of securities to Exeter. The broker will need written authorization from the donor before the transfer. The donor should be sure to provide the broker with the name of the stock to be transferred, the number of shares, and the intended designation of the gift once it reaches the Academy. Once the donor has authorized

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the transfer, the donor should ask the broker to contact the Annual Giving Office at (603) 777-3473. The Annual Giving Office will provide complete transfer instructions. The gift amount is determined by the mean value of the securities on the date of transfer from the donor's account.

### • **Mailing Stock Certificates**

If the donor's securities are not held by a broker, the donor can mail the certificate directly to Exeter. Unendorsed stock certificates should be mailed to the Gift Recording Office by registered mail with a letter stating the purpose of the gift. **(Please do not mail endorsed certificates! Once a certificate is endorsed, it is legal tender and can be exchanged by anyone).** A signed stock power should be sent under separate cover with a copy of the transmittal letter. This method provides additional security. For tax purposes, the date of the gift is the day the donor surrenders control: the date of mailing (through the U.S. Postal Service) or the date of the stock power.

Send both envelopes to:

**Gift Recording, Nathaniel Gilman Alumni/ae House,  
Phillips Exeter Academy, 20 Main Street, Exeter, NH 03833-2460.**

Please Note: It is imperative that the Annual Giving Office be notified of all possible stock transfers as soon as possible. This helps us avoid a "mystery stock" situation, which occurs when a transfer arrives without donor information attached. "Mystery stock" cannot be credited to the appropriate fund until a donor name is uncovered. To reduce the likelihood of this situation, we ask you to contact our office with news of all potential stock transfers—no matter how uncertain the possibility.

## **MEMORIAL GIFTS**

Memorial gifts are contributions from widowers, widows, friends, business associates and classmates intended to honor deceased alumni/ae, faculty members and others associated with Exeter. When the school receives a memorial gift, the widower, widow or next of kin of the deceased is notified. The donor also receives an acknowledgment from the Academy.

Memorial gifts from classmates, widowers and widows may be credited to the class of the deceased alum; memorial gifts from other sources are not credited to the class of the deceased.

## **MATCHING GIFTS**

Encourage your classmates to double — or even triple! — their gift to Exeter by having their employer match their donation. Thousands of companies offer programs to match their employee's charitable contributions. Some companies even offer to match their employee's

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## 1. Annual Giving at Exeter

spouse's contributions, meaning that a classmate's donation may be eligible for a match if his or her spouse works for a matching gift company. A complete list of these companies is located on our website, <http://phillips.exeter.edu/giving/waystogive.html>.

Use VOR to determine which classmates are employed at matching gift companies, and remind them to initiate the matching gift process with their Human Resources Office. Some companies have an automated program that necessitates only a telephone call. Others require forms to be completed by the employee. These forms can be mailed to the Gift Recording Office along with the contribution. A gift recorder will verify match eligibility and return the forms to the company.

Most corporations have guidelines that must be met by the non-profit organization and employee before a contribution will be matched. The Human Resource Office can usually provide additional information about specific stipulations.

## PLANNED GIVING

We'd like to debunk the myth that planned giving is only for the very old or the very rich. It is an important way in which each alumnus/a can continue to support the school even after slipping from this mortal coil.

A planned gift is the major gift for most people — those who cannot afford to give away significant capital during their lifetimes, because they need the income, or shelter of the assets, to support their lives. The Planned Giving Program at PEA has been run on a formal basis (creation of the Heritage Circle, marketing of planned gift vehicles, etc.) for about 30 years. However, loyal alumni/ae have been providing capital to the Academy through their estates for many more decades.

It is likely that, except for the youngest classes, there are several members of the Heritage Circle in your class already. This is the recognition group at Exeter for those who have made provision for the Academy in their estate plans. For the youngest alumni/ae that can be a simple bequest in their first will or contingent beneficiary in their first retirement plan or life insurance policy. For older alumni/ae it may be a gift annuity providing income during their lifetime (or the lifetime for someone for whom they wish to provide) or a complex trust for the benefit of grandchildren. Planned gifts in which the donor has made an irrevocable designation of the Academy's interest and agrees to provide annual statements from the fiduciary may be considered in fund-raising totals.

A planned gift may be funded with cash, securities, real estate or personal property. Many provide income. Almost all provide an income tax deduction. For more information about planned giving, please contact **Chris Wronsky**, Director of Planned Giving, at (603) 777-3594, [cwronsky@exeter.edu](mailto:cwronsky@exeter.edu), or visit the website at <http://phillips.exeter.edu/plannedgiving>.

# THE 2009-10 FUND YEAR

## ANNUAL FUND GIVING GOALS

DOLLAR GOALS	
Non-Reunion Alumni/ae	\$3,700,000
Reunion Alumni/ae	\$2,000,000
Present Parents	\$875,000
Past Parents	\$325,000
Grandparents	\$50,000
Friends	\$50,000
<b>TOTAL</b>	<b>\$7,000,000</b>

## NON-REUNION CLASS GOALS

Your dollar goal was established over the summer with careful consideration of those factors that influence fundraising, such as class roll, class giving history and outstanding pledges. Though not directly solicited, Class Agent input is certainly welcome at any point in this process. Please note that the goals presented in this manual are not carved in stone. Feedback from Class Agents may still result in an adjustment.

%			%			%		
CLASS	Participation	GOAL	CLASS	Participation	GOAL	CLASS	Participation	GOAL
1936	70%	\$10,000	1963	58%	\$55,000	1993	43%	\$30,000
1937	70%	\$15,000	1964	58%	\$60,000	1994	36%	\$25,000
1938	70%	\$25,000	1966	62%	\$120,000	1996	33%	\$23,000
1939	70%	\$25,000	1967	53%	\$55,000	1997	38%	\$34,000
1940	70%	\$25,000	1968	53%	\$55,000	1998	32%	\$20,000
1941	90%	\$55,000	1969	62%	\$125,000	1999	35%	\$15,000
1942	70%	\$40,000	1971	50%	\$50,000	2001	37%	\$30,000
1943	80%	\$75,000	1972	54%	\$85,000	2002	37%	\$10,000
1944	79%	\$50,000	1973	50%	\$110,000	2003	42%	\$12,000
1946	80%	\$40,000	1974	52%	\$160,000	2004	35%	\$7,000
1947	80%	\$60,000	1976	54%	\$125,000	2006	30%	\$5,000
1948	90%	\$75,000	1977	50%	\$210,000	2007	36%	\$7,000
1949	85%	\$80,000	1978	55%	\$110,000	2008	32%	\$6,000
1951	100%	\$75,000	1979	52%	\$100,000	2009	35%	\$4,000
1952	80%	\$80,000	1981	50%	\$90,000			
1953	75%	\$65,000	1982	52%	\$125,000			
1954	75%	\$80,000	1983	50%	\$90,000			
1956	75%	\$80,000	1984	50%	\$85,000			
1957	80%	\$75,000	1986	50%	\$85,000			
1958	75%	\$75,000	1987	50%	\$80,000			
1959	85%	\$90,000	1988	50%	\$80,000			
1961	70%	\$75,000	1989	50%	\$80,000			
1962	71%	\$65,000	1991	50%	\$35,000			
			1992	37%	\$25,000			

## THE 1781 SOCIETY

### The 1781 Committee

#### Chairs

Grif Johnson '68

Laurisa Shappell Schutt '88

#### Committee

Jim Yocum '44 • Bronson Binger '48 • Ralph Jones '48 • Pat Stranahan '48 • Ron Huebsch '49 • Ricardo Mestres '51 • Larry Coburn '52 • Bill Dakin '53 • Lang Cook '56 • Davis Robinson '57 • Barry Bosak '58 • Dan Hogan '61 • Ted Leary '62 • Dan Freudenberger '63 • Jim Rogers '63 • Nat Butler '64 • Hedley Stothers '64 • Lew Lane '66 • Jay Riley '66 • Rick Smith '66 • John Cosentino '67 • Chuck Goldberg '67 • Steve Lane '68 • George Bain '69 • George Kalikman '71 • Bill Rawson '71 • Alan Jones '72 • Rob Kenet '73 • Steve Mandel '74 • Mike O'Neal '74 • Peter Renner '74 • Emily Barr '76 • Kirk Stambler '76 • Jenny Young du Pont '78 • Cory Edelman Moss '78 • Tex Elkin '78 • Andrew Craighead '79 • Gene Lynch '79 • Charlie Bitzer '81 • Peter Williams '81 • Deb D'Arcangelo '82 • Jay Kern '82 • Eiichiro Kuwana '82 • Stephen Reily '82 • Paige Smith Orloff '84 • John Fuller '86 • Jim Bankoff '87 • Ashely Norton '89 • Brad Gibbs '88 • Alex Berkett '93 • Margaret Hartigan '93 • Caroline Frank Lapidus '94 • Meg Morris '98 • Emily Fincke '03 • Will Post '04

#### Ex-Officio

Tom Hutton '73

*President of Trustees*

Jonathan Bean '81

*National Alumni/ae Chair  
Annual Giving Fund*

Monica Shelton Reusch '77

*President, General  
Alumni/ae Association*

Named in honor of the year in which Phillips Exeter Academy was founded, The 1781 Society recognizes donors who contribute \$1,781 or more during the fiscal year. The Academy appreciates gifts of all sizes, but leadership-level gifts are critical to Exeter's fund-raising success.

The 1781 Society is comprised of six gift clubs:

- **John Phillips Associate**  
\$100,000 and up
- **Daniel Webster Associate**  
\$50,000 to \$99,999
- **Jeremiah Smith Associate**  
\$25,000 - \$49,999
- **Lewis Perry Associate**  
\$10,000 - \$24,999
- **William Saltonstall Associate**  
\$5,000 - \$9,999
- **Hamilton Bissell Associate**  
\$1,781 - \$4,999

For the past several years, top prospects have been culled from the mainstream Annual Giving Fund solicitation process and given special attention by The 1781 Committee. This committee works to stimulate leadership giving, to motivate current leadership donors to increase their level of support, and to provide a means for cultivating and recognizing top prospects. The 1781 Committee consists of Class Agents, Class Presidents, and current and former Trustees who serve under the leadership of Chairs.

Alumni/ae solicited by the Committee will not appear in regular Class Agent mailings. Class Agents will be provided with the names of any classmates who fall into this category. In the fall and spring, the Chairs will send solicitation letters to top prospects asking them to consider a leadership gift and stressing the importance of leadership giving to Exeter.

Class Agents — although not directly soliciting members of The 1781 Society for a contribution — are encouraged to be involved in the process. Acknowledgments and endorsements of leadership solicitations are helpful. Notes, telephone calls and e-mail messages of thanks are also appreciated.

# 2009–10 TIMELINE

SEPTEMBER 2009						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

OCTOBER 2009						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

NOVEMBER 2009						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

DECEMBER 2009						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

JANUARY 2010						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

## SEPTEMBER

- 1-30 Class Presidents' letter sent to all classmates
- 25-26 Alumni/ae Council Weekend

## OCTOBER

- 1-31 Personally solicit assigned classmates
- 17-31 Recruit classmates for November phonathons
- 26 Exeter phonathon – PEA Gilman House
- 28 Exeter phonathon – PEA Gilman House

## NOVEMBER

- 1-30 Send handwritten or electronic messages to classmates who are top prospects
- 2 Boston phonathon – KLD Research & Analytics
- 16 – 17 New York phonathon – The Cornell Club

## DECEMBER

- 5 Academy end-of-calendar-year. Direct mail appeal to all non-donors
- 7 Exeter parent phonathon – PEA Gilman House
- 10 Academy electronic appeal
- 29 Academy follow-up electronic appeal
- 31 Last chance to make a gift for tax year 2009!

## JANUARY

- 3-17 Send notes of thanks to donors who gave between July 1 and December 31, 2009
- 17-31 Recruit classmates for spring phonathons

# 2009-10 TIMELINE

FEBRUARY 2010						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

## FEBRUARY

- 1 San Francisco phonathon – Goldman Sachs & Co.
- 3 Los Angeles phonathon – TBD
- 22 Washington, DC phonathon – The Carmen Group

MARCH 2010						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

## MARCH

- 1-31 Receive and send personalized solicitation brochures/letters to classmates
- 1 & 2 New York phonathon – The Cornell Club
- 3 Greenwich phonathon – Lone Pine Capital LLC

APRIL 2010						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

## APRIL

- 19 – 20 Exeter phonathon – PEA Gilman House
- 26 Boston phonathon – TBD

MAY 2010						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

## MAY

- 1-31 Make calls to classmates who are lapsed donors (LYBUNTs & SYBUNTs)

# 2009-10 TIMELINE

JUNE 2010						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

## JUNE

- 4 Academy final direct mail appeal to all non-donors
- 10 Academy electronic appeal
- 7-10 Student phonathon – PEA Gilman House
- 13-17 Student phonathon – PEA Gilman House
- 25 Academy final electronic appeal
- 30 **Fiscal year 2009-10 Ends. Last chance to make a gift credited to the 2009-10 fiscal/campaign year**

JULY 2010						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

## JULY

- 1-31 Send notes of thanks to donors who gave between January 1 and June 30, 2010
- Final volunteer update to Class Agents



## COMMUNICATION

### SOLICITATIONS

Class Agents are responsible for sending solicitations to their classmates during the fiscal year campaign; these solicitations usually take the form of mail or e-mail. An Annual Fund staff member will gather your Class Agents on a conference call to discuss the strategy of outreach to your classmates. If there is more than one Class Agent, you will also determine how to divide your class amongst the group. Conference calls will be arranged periodically throughout the fiscal year in order to communicate progress and discuss upcoming outreach to classmates.

### COMMON THEMES FOR PERSONAL NOTES

#### Nostalgia

*Remember when . . .*

#### Budget Argument

*In reality, we were all scholarship students, as tuition and fees cover only about half the cost of an Exeter education.*

**Please refer to The Case for Annual Giving (section 1) for other creative ideas for your personal notes to classmates.**



### NOTES OF THANKS

One of the most important responsibilities of a Class Agent is thanking donors for their gifts and pledges. Although all donors receive an acknowledgment from the Academy, **thank you notes from agents have a long-term effect on consistent giving.** Phillips Exeter Academy note cards and stationery are available upon request. Please contact the Annual Giving Office at 1-800-828-4325 ext. 3473 or [annualgiving@exeter.edu](mailto:annualgiving@exeter.edu).

### TELEPHONE

The phone campaign is an essential component of a successful effort in the Annual Giving Fund campaign. We can help you arrange conference calls with co-Class Agents to discuss assignments and arrangements.

### TELEPHONE SOLICITATIONS

#### Before the Call:

- Familiarize yourself with information about your classmates on VOR. Pay particular attention to giving history as a basis for determining a specific ask amount.
- You and your classmates share a similar Exeter experience. Be prepared to explain your reasons for supporting the Academy.

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### 3. Communication

#### During the Call:

- State the purpose of the call and conduct the solicitation first, even with friends, then socialize. The call will be easier and more enjoyable.
- Encourage the use of credit cards. Exeter accepts Visa, MasterCard, American Express, and Discover. **Record the card type, account number, expiration date, security code, the amount of the gift, and the name of your classmate as it appears on the card, as well as the gift designation (Annual Giving, or another fund).**

#### After the Call:

- Please immediately alert the Annual Giving Office, 1-800-828-4325 ext. 3473, when a classmate makes a gift or pledge over the telephone so we can send an acknowledgment to the donor as soon as possible. Also, please convey any other pertinent comments/information shared by classmates.
- Send a written or electronic note of thanks.

#### Calling Cards

Exeter will provide a PAETEC calling card to class agents making calls for campaign purposes. To request a card, please contact the Annual Giving Office at 1-800-828-4325 ext. 3473, or [annualgiving@exeter.edu](mailto:annualgiving@exeter.edu).

**PLEASE NOTE:** Do not use your calling card to call the Academy. It is much more cost-effective to use our toll-free number: **1-800-828-4325 Ext. 3473.**

You may find it difficult to reach some classmates by telephone. But don't despair when confronted with an answering machine or messaging service. A thoughtful message can be just as effective as a live conversation. Be sure to state your name and the purpose of your call, and then offer to call back at a later time.

#### PHONATHONS

Phonathons are an integral part of the campaign. During the fall and spring, Exeter phonathons will be held across the country. A complete schedule is located in Section 2 — Campaign Timeline.

As a Class Agent, you should attend phonathons in your area, AND recruit classmates to attend phonathons in their areas. Your recruitment of classmates to attend each phonathon will impact your class numbers in a very positive way, saving you time and effort.



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### 3. Communication

A few classes have divided phonathon recruitment equally among Class Agents, with each agent recruiting classmates to attend phonathons in one or two locations. This method has worked quite well. If your class would like to try this approach, the Annual Giving Office is available to assist with coordination. We also have lists of your classmates in each location. To obtain a copy, please contact us at least two weeks prior to the scheduled phonathon.

## **VIRTUAL PHONATHONS**

A virtual phonathon is a phonathon conducted by classmates on the same evening from their own locations rather than from one common location. It can take place in the evening over a one- to three-day period, which will allow the callers to choose the day and time that best suits their schedules. The phonathon is arranged via a conference call on which the callers discuss strategy and assignments.

This is a great way to bring together several classmates as a team for an evening of calling. It enables a class to involve more classmates in their fundraising efforts, especially those who may not otherwise be able to participate in a regional phonathon.

Interested in trying a virtual phonathon with your class?? Call the Annual Giving Office and we will help make it happen.

## **STUDENT PHONATHONS**

For the past seven years, the Annual Giving Office has hired current day students to make calls for Exeter after graduation. So far, **289** students have participated in contacting **4,489** donors, leaving **31,191** messages, and raising **\$764,153** for the Annual Fund! The student phonathon is a wonderful opportunity for alumni/ae and students to connect, and both have found the experience very rewarding. The Annual Giving Office is extremely proud of the accomplishments of the student callers and, given the program's tremendous success, anticipates these phonathons will continue to be an integral part of the fundraising campaign. For more information about our student phonathon program, feel free to contact the Annual Giving Office.

## **CONNECTATHON**

College age Exonians play an essential role in Exeter's future, especially when it comes to participation in the Annual Giving Fund!

Last April, Exonians from the classes 2005 to 2008 in the Boston area were invited to participate in our annual "connectathon". The connectathon was held at Harvard University during a later time in the evening than a regional phonathon; the change in time accommodated a college schedule

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### 3. Communication

as well as gave access to free cell phone minutes. Using their cell phones and laptops, young alumni/ae made calls, sent text messages and e-mailed classmates on behalf of Exeter's Annual Giving Fund.

This event is a great way to re-connect with classmates, hear updates from the Academy, and helps to ensure that Exeter maintains the highest caliber educational experience for current and future Exonians.

#### **E-MAIL**

Increasingly, volunteers are communicating with one another by e-mail — to coordinate with co-Class Agents, to recruit classmates to attend phonathons, to solicit classmates for gifts to the Annual Giving Fund, and even to thank classmates for their contributions. Your classmates' e-mail addresses are available through the Online Directory as well as through VOR. Please help us keep this list up-to-date and growing by updating your record online at <http://phillips.exeter.edu>, and encouraging your classmates to do the same.

We request that all volunteers register for an "@alum.exeter.edu" e-mail forwarding address. Using this service demonstrates your school spirit and helps the school and your classmates seamlessly keep in touch with you if and when you change your e-mail address.

#### **EXIENET**

**ExieNet**, (<http://phillips.exeter.edu>), Exeter's online tools and services for alumni/ae, provides tools and information to keep you and your classmates connected to the school, as well as each other. We ask that you, as a volunteer, use and promote these online resources.

*If you haven't registered yet, please do so now.* Registration requires only four simple steps. Or, go to <http://phillips.exeter.edu> and click on the registration link.

Please be sure to sign up for the Exeter's e-mail forwarding service. Because you are a volunteer, we post your name on the class website with a link to your e-mail address.

#### **ONLINE RESOURCES**

- **Online Directory** — This directory is accessible only to Exeter alumni/ae, and it provides information on all alumni/ae in the Academy's database, whether or not they are registered for ExieNet. It's a great place to network — log on and search for classmates or other Exonians in your area. The online directory is particularly helpful to anyone moving to a new city, working as a class volunteer, or just wanting to connect with fellow Exonians.

<http://www.alumnicconnections.com/olc/pub/EXR/oldintro/oldintro.cgi>

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### 3. Communication

- **Online Events Calendar** — Check here for upcoming Exeter events around the world, to find information about your reunion or to register for an event you plan to attend. Events are added almost daily, so check often. <http://www.alumniconnections.com/olc/pub/EXR/eventcal/eventcal.cgi>
- **Class Websites** — Be sure to visit your class web page to find contact information for fellow volunteers, the latest class news and details about reunions and class giving to date. Click on the link to your class correspondent and send some news about yourself for *The Exeter Bulletin*. <http://phillips.exeter.edu/classes/>



## MAIL RULES

- BA** Bad Address — PEA mail recently returned by P.O. and I/S is in the process of searching for correct address.
- LO** Person is Lost — all searches for addresses have been explored.
- NA** Receives No Exeter Appeals (request)
- NB** Receives No Alumni/ae Bulletin
- NCN** No Class News
- ND** No Duplicates
- NDA** Receives No Direct Appeals (request) — Donor wants Electronic Appeals only
- NEA** Receives No Electronic Appeals (request)
- NEI** Receives No Electronic Invitations (request)
- NEM** Receives No Electronic Mail (request)
- NH** No Home phone calls (request)
- NM** Receives No Exeter Mail (request)
- NN** Receives No Invitations (request)
- NOL** No Online Listing (request) — No information displayed on ExieNet
- NOP** No Outside Promotions (Travel Agency trips, cruises etc.)
- NP** No Phone Appeals
- NPN** No PEA News
- NS** Receives No Sports Invitations (Alumni/ae basketball, hockey games etc.)
- NSI** No Service Invitations
- NW** No Work phone calls (request)
- PNA** Receives No Exeter Appeals (PEA request)
- PNM** Receives No Exeter Mail (PEA request)
- PNN** Receives No Invitations (PEA request)
- TS** Tracer (letter) sent to verify home and business addresses

## VOLUNTEER ONLINE REPORTS (VOR)

Exeter fundraisers have several [Volunteer Online Reports \(VOR\)](#) available for their use. With this resource, the Academy can respond more effectively to the needs of volunteers by giving them immediate access to their class fundraising status.

The reports, which are similar to hard-copy reports you may have received in the past, will be updated overnight at the end of every business day.

The following is a brief summary of the capabilities of VOR:

- up-to-date dollar totals and percent of participation
- entire class list
- donor status lists: current donor, LYBUNTs, SYBUNTs, occasional, and never donors
- non-solicitable classmates
- ability to sort donor status lists by last name or by date of last gift
- detailed information on individual classmates
- ability to email classmates
- Alumni/ae Giving Report (all classes)

### Logging In

To access VOR [click here](#) and log in, or:

- go to <http://phillips.exeter.edu>
- under the **Volunteering** heading click on **Resources for volunteers**
- click on **Class Agent Volunteer Online Reports (Lion Links)**
- the Lion Link's page will prompt you for your username and password

### Confidentiality/Privacy:

Exeter is committed to protecting the security and confidentiality of records contained in its information systems. The information in VOR is intended exclusively for purposes related to furthering the mission of the Academy. It is not to be used for private, commercial, political or any other purpose not directly related to the Academy. This information is not to be shared with any other classmate, individual or organization. The information in VOR is delivered in a secure environment after completion of appropriate logon and password protocols. We expect that as an Exeter volunteer you will be as committed to protecting the security and confidentiality of the records and information as Exeter is by using the data only within the environment that it is delivered to you.

**Please call the Annual Giving Office, (603) 777-3473, if you have any questions.**

## QUESTIONS AND ANSWERS ABOUT ANNUAL GIVING

**Q. What is our goal for Fiscal Year 2009–10?**

**A.** The overall Annual Giving Fund goal is to raise \$7 million by June 30, 2010. In order to meet this ambitious goal, the Academy depends on continuing annual support from alumni/ae, parents, grandparents, and friends.



**Q. When should I solicit?**

**A.** Our fiscal calendar runs from July 1, 2009 to June 30, 2010. You will receive your materials mid-October through November, and should complete as many solicitations as possible by the end of the calendar year so that donors may take advantage of the tax deduction for that year. (Remember that checks must be **postmarked by December 31** in order to receive tax credit; stock gifts must be transferred to the broker by the same date). All remaining solicitations and follow-ups will be carried on throughout the year.

**Q. How are gifts to the Annual Giving Fund used?**

**A.** The Annual Giving Fund has a specific mission: to help meet the most immediate, annual needs of students and teachers through the operating budget of the school. Annual Fund gifts are put to use right away, and the entire Fund is spent each year, unlike the endowment, which must be saved and invested for the future. The great value of Annual Fund gifts lies in their immediacy and their flexibility. Because these gifts are unrestricted, they can help address any area of need. They provide approximately 8 percent of the Academy's operating budget each year. As a result, Annual Fund gifts play a critical role in essentials such as keeping tuition increases in check and providing competitive faculty salaries.

**Q. If a classmate gives to Friends of the Academy Library, does that count toward the Annual Giving Fund?**

**A.** No, contributions to Friends of the Academy Library are considered restricted gifts. The Annual Giving Fund contributions must be unrestricted and can therefore be applied to any specifically designated area of need in the school's budget.

**Q. What size gift should I ask for?**

**A.** Use your own knowledge of your prospect's circumstances and his/her recent giving record, which is listed in VOR. For recent donors, seek a healthy increase — and be ready to negotiate. For students in college or graduate school, you may need to lower your sights somewhat; otherwise, think big. Remember, many people are flattered to be asked for a larger gift.

**Q. When a prospective donor claims, "I'm financially strapped; I can't give," how should I respond?**

**A.** First, remind your classmate that current Annual Giving Fund gifts can be made until June 30, 2010. A second option is for the donor to use VISA, MasterCard, American Express, or Discover. A one-time gift or a scheduled monthly gift can be made this way. If your classmate is still hesitant, discuss a smaller gift. Also, stress the importance of participation; token gifts this year can lead to larger ones in the future. In addition, grants from corporations and foundations are sometimes decided on the basis of alumni/ae participation in the Annual Giving Fund. Finally, remind your classmate that gifts are tax deductible.

**Q. How should I respond to a refusal for non-financial reasons?**

**A.** Ask your classmate — diplomatically — why he/she chooses not to support Phillips Exeter Academy. Either you or someone at the Academy may be able to address your classmate's concerns. One of the greatest services you can provide the school, under such circumstances, is to listen and pass along any message.

**Q. I can't make a large gift to Exeter; does my small Annual Giving Fund gift really matter?**

**A.** Yes!! The power of thousands of Exonians joining together to support the fund is tremendous. It would require approximately \$185 million in unrestricted endowment to generate the amount given by alumni/ae, parents and friends through the Fund annually. The impact of their gifts cannot be overstated. Imagine, for example, 8 percent missing from the operating budget. Exeter would continue, and it would remain a good school, but the special margin of excellence that is evident across campus would be diminished. Each and every gift does matter!

## GLOSSARY OF TERMS

<b>The 1781 Society</b>	A special group comprised of non-reunion leadership donors who contributed \$1,781 or more to Exeter during the fiscal year.
<b>Acknowledgment</b>	A receipt — necessary for tax purposes — that acknowledges a gift or pledge. These receipts are sent out by the Academy along with a handwritten note of thanks.
<b>The Annual Giving Fund</b>	An umbrella term for the fund that raises dollars each year from alumni/ae, parents, grandparents and friends to support the Academy's operating budget.
<b>Current Use</b>	Refers to money raised during a given fiscal year that is spent on budgeted projects in that same fiscal year.
<b>Detail Report</b>	A report enclosed with your bi-monthly volunteer updates that reflects gifts and pledges received from classmates since the beginning of the fiscal year — July 1, 2009.
<b>Fiscal Year</b>	The financial year, which runs from July 1 to June 30.
<b>Gifts</b>	A synonym for cash, securities and property received by the Academy.
<b>LYBUNTs /SYBUNTs</b>	Potential donors who contributed “Last Year But Unfortunately Not This” year/potential donors who contributed “Some Year (within the past five years) But Unfortunately Not This” year.
<b>LYBUNT/SYBUNT Report</b>	A report enclosed with your bi-monthly volunteer updates (from March to June) that lists all LYBUNTs and SYBUNTs from your class who have not contributed to the current campaign.
<b>Mail Code Restrictions</b>	Codes used to indicate an individual's preferences in regard to communication with the Academy. A more detailed explanation is available on the first page of your prospect list. Please contact our office for further explanations.
<b>Matching Gift</b>	A company gift intended to match an individual gift.
<b>Operating Budget</b>	The budget created each fiscal year to support the most immediate, annual needs of the Academy.
<b>Planned Gift</b>	A gift to Exeter that offers a life-income to the recipient with Exeter as the beneficiary.
<b>Pledge</b>	A future commitment to the Academy that is usually detailed in a pledge schedule agreement.
<b>Prospect List</b>	An alphabetical listing of all living classmates. This list includes biographical and contact information, as well as a five-year giving history.
<b>Restricted</b>	An area to which donors contribute money for a designated use — for example, gifts to the Friends of The Academy Library.
<b>Unrestricted</b>	An area to which donors contribute money for an undesignated use. These funds are used for operating expenses deemed of the highest priority by the Trustees. Annual Fund dollars are unrestricted dollars.
<b>Volunteer Update</b>	A bi-monthly report sent to class agents between November and July.