

CLASS PROJECTS AND CLASS GIFTS:

A GUIDE FOR CLASS OFFICERS

2008

Class Projects and Class Gifts

Background

Over the years, Dartmouth alumni classes have generously provided financial support to the College above and beyond individual gifts to the Dartmouth College Fund in the form of class projects and class gifts. This support is intended to fulfill identified needs of the College while helping to unite a class and, in many cases, to unite a class with students.

The key distinction between class projects and class gifts is the donation amount. Donations less than or equal to \$10,000 per year are designated as class projects. Donations greater than \$10,000 per year are class gifts. While class projects are managed by Class Treasurers with the aid of the Office of Alumni Relations, class gifts receive additional guidance from the Office of Development through the Head Agent.

Class Project Summary

- Support that totals \$10,000 or less per year, donated annually or on a one-time basis.
- The Treasurer collects the funds as part of dues collection. The class manages processing of the payment, including gift acknowledgement to the individual for donations over \$250.00, and the Treasurer is the key contact person for the project.
- The class receives credit for the gift, which is tax-deductible.
- Most classes have at least one class project, and some classes have several. Only solvent classes should consider supporting a class project.

Class Gift Summary

- Support above \$10,000 or more per year, collected at one time or over several years.
- In addition to the Office of Alumni Relations, the Office of Development provides key support in the establishment and maintenance of the gift.
- The Head Agent is the key contact, and works closely with development to solicit funds through form letters and through personalized contact for large asks.
- Individuals, as well as classes, receive credit for the gift.
- Close contact with alumni relations and the development office is particularly important in establishing and managing class gifts.

Comparison between Class Projects and Class Gifts:

	Class Projects	Class Gifts
Annual Amounts	\$10,000 limit per project per year	No Limit, but gift must be greater than \$10,000 per year
Recurrence	one time or annual	one time or over multiple years
Solicitation Methods	Line item on dues slip or as part of dues collection	Class members solicit through form letters; personalized contact for large asks
Gift Credit	Class credit, not individual	Both class and individual credit
Tax Deductible	Yes, class responsible for receipts for gifts over \$250.00	Yes, College is responsible for receipts
Payment Processing	Class	College/Development
In Case of a Target Shortfall	Either class makes up shortfall from treasury or project deferred a year	Either class makes up shortfall from treasury or gift deferred a year
Approval Process	Alumni Relations; petition process for projects not on list	Alumni Relations & Development
Benefits	Easier to meet goals Well established process Builds class unity Connection to current students Fulfills a College need	More significant contributions Creative gift options Builds class unity Processing by College Support from Development Often permanent gift Fulfills a College need
Challenges	Fewer options for projects Processing burden on class Not all projects leave a permanent legacy	Target shortfall Solicitation is difficult Not motivating to all classmates

Class Projects

Setting Up Class Projects

Class projects should only be considered if classes are financially solvent!

- Classes identify their goals, objectives and needs in selecting a project:
 - Objective and motivation for undertaking project: connecting with current students, honoring classmates, permanent contribution to Dartmouth, etc.
 - Scope of project: financial commitment, term of project.
- Classes review the projects on the wish list to identify projects that are of interest to the class and congruent with their goals and needs.
- The Treasurer/President (or other officer) consults with the Director of Class Activities to discuss the list of projects that are of interest to the class (confirm the projects still need funding and are of appropriate scope for the class.)
- The class officially chooses and endorses the project. The official endorsement may either be a vote confirming one project or selecting one from a short list of projects. The endorsement may take place either at a class meeting or by vote of the Class Executive Committee.
- The procedures for undertaking projects outside of this list are addressed below.

Operating Class Projects

- Classes may choose to participate in multiple projects. Each project requires the approval process described in the above section.
- Classes are responsible for collecting, processing, and managing the funds associated with class projects. Funds are usually collected from class dues, and more detail can be found in following sections.
- Some classes choose to operate the projects as separate budgets (with separate banking accounts). Other classes choose to operate projects within their overall operating budget.
- Many classes have Class Project Chairs – members of the Executive Committee who are responsible for managing many of the aspects of the project, establishing a relationship with the Dartmouth office benefiting from the project, communicating with the students that directly benefit from the project, writing correspondence to class about project, etc.
- Contributions to class projects are tax deductible. Classes are strongly encouraged to acknowledge all contributions over \$250.00, and may use the following language:

The Dartmouth College Class of XXXX thanks you for your gift of \$Y to the Class Project Fund. Your gift will be used for the charitable purposes of Dartmouth College. Dartmouth College Class of XXXX is a subordinate unit of Trustees of Dartmouth College. Gifts are tax deductible as permitted by law. The donor has not received goods or services in consideration of his/her gift(s).

Communications

- Effective communication is critical to the success of class projects! The more classmates know about the project, the more likely they are to contribute!
- Classes should include communication about class projects in their dues letter, which explain how the project funds will be used and ask for contributions. Examples of effective dues letters may be found on the Treasurer's Association website: <http://dartmouth.org/treasurers/>.
- Classes are encouraged to include communication about class projects in newsletters, on class websites and in other communications to the class. Communications include both descriptions and objectives of projects, as well as progress toward financial goals.
- For projects that directly benefit current Dartmouth students, the benefited students are encouraged to share their experiences with the class. The personal connection between a current student and an alumni class serves as a great motivator for classmates to give to the project, as they see the direct benefit of their contributions.
- A Class Project Chair, if the class chooses to elect one, is tasked with managing the communications efforts.

Financing Class Projects

Projects are traditionally funded from class dues, with several options of collecting the monies to support the projects.

- Classes may designate a portion of the class dues for the projects. Some classes choose to fund class projects entirely from dues, simplifying the accounting process.
- Classes may include a separate line item on the dues form for class projects.
- If a class is engaged in multiple projects, they may choose to have either one line item for all projects or separate line items for each project. The former simplifies the accounting of funds for multiple projects and allows the Treasurer to allocate the money as needed among the projects. The latter allows classmates to contribute to the projects of greatest interest to themselves, but requires more time and effort from the Treasurer.
- Classes may make contributions from their class treasuries to class projects. For example, if a class has made a significant profit at a reunion, they may choose to donate that surplus to a project.
- Classes may choose to designate profits from other activities to class projects (participation in affiliate networks, sales of reunion books, sales of class souvenirs.)
- Treasurers can run a report of contributors and total contributions to class projects in Quickbase. *Note: for classes conducting multiple projects and using separate line items for each project, Quickbase uses a default contribution amount for each project in the order projects are listed. If a classmate contributes to projects in a different manner, the Treasurer will have to manually override the contributions in Quickbase. Quickbase also tracks contributions above and beyond default dues and project amounts, which Treasurers generally attribute to class projects.*

Approval Process for Projects not on the Wish List

Sometimes classes propose a new project that is not on the current “wish list” of class projects. The Director of Class Activities is the first and last stop in seeking approval for new proposals, and shepherds the process from initiation and discussion with appropriate departments on campus about feasibility and funding, to final sign-off. There are instances when a proposal either does not meet a need, or comes into conflict with campus plans and priorities. In particular, proposals that impact physical spaces, such as statues, plaques, and other artwork must go before certain established College committees. Ultimately, it must be the College, and not the class, that makes the final decision on the viability of a class project. That being said, the Director of Class Activities will work as a liaison between the class and the appropriate department to find a suitable solution that benefits everyone.

Class Project Wish List

Hill Winds Society – Office of Alumni Relations

The Hill Winds Society, sponsored by the Office of Alumni Relations, is a diverse group of students selected to be ambassadors to the alumni body. The society was founded in 2006, and is comprised of about 30 students from the sophomore, junior, and senior classes. Society members are selected based on their campus involvement, communication skills, leadership ability/potential, and infectious Dartmouth spirit.

The goals of the Hill Winds Society are to (1) Increase interaction between students and alumni; (2) Educate students about the role of alumni in the College; and (3) Educate alumni about the current student experience. The students have accomplished these goals through a number of initiatives, including Dartmouth History & Traditions Tour, Student-Alumni Trivia, Dartmouth Alumni Appreciation Week, Regional Alumni Club Outreach, Student-Alumni Golf Tournament, Student & Trustee Wine & Cheese Reception, Sophomore Summer Etiquette Dinner, and a Dartmouth History & Traditions Book. For more information about the Hill Winds Society, please check out our Web site: <www.alumni.dartmouth.edu/hws>

Funding from class projects will support new student-alumni initiatives, educational opportunities, and leadership development programs. (Cost - any amount up to \$10,000)

Memorial Book Fund—Library

In 1946, the Dartmouth Class of 1914 conceived the idea of honoring its deceased members by making funds available to the Library for the purchase of books in their memory. Each volume acquired has permanent value to the collection and carries a special bookplate bearing the name of the classmate being honored. The cost of each book is determined by the class and typically ranges from \$40 to \$100. Since the program's inception, over 50 classes have participated, and over 12,800 books have been added to the Library's collection. The Library receives semi-annual reports from the Alumni Records Office of the names of alumni to be memorialized and reports on selected memorial books to the designated Class representative. (Cost: up to \$10,000)

College Archival Film and Video Preservation—Library

The Library has extensive and unique recordings of lectures, performances, athletics competitions, and College events and ceremonies that require reformatting to digital formats for restoration and preservation and to make them more easily accessible to students, faculty and other scholars, and alumni. Examples include lectures sponsored by the Montgomery Endowment, Rockefeller, Dickey, and Leslie Centers; performances at the Hopkins Center; Great Issues courses; Dartmouth class and athletic films; and coverage of Convocations,

Investitures, and Commencement Ceremonies. Class funding could be used to preserve recordings from the era that class attended Dartmouth. (Cost: up to \$10,000)

Tucker Fellow Stipends – Tucker Foundation

Tucker Fellowships engage students in full-time work at a nonprofit organization or public agency during a leave term. Fellows must devote at least 60% of their time to direct service (e.g., teaching, working with youth or the elderly, assisting health care providers). Office support, event planning, and fundraising aren't considered direct service, but may be part of a fellowship. Students experience personal growth not only through direct service, but also through a required reflection paper and discussions with Tucker Foundation staff and other fellows after they return to campus. Fellowships are initiated by students and can occur in the United States or another country. The class will be recognized as the fellowship sponsor for each \$4,000 provided, and the Class President will receive a report on the students and projects supported by the class. (Cost: \$4,000)

Dartmouth Partners in Community Service Intern Stipends – Tucker Foundation

Internships sponsored by the Dartmouth Partners in Community Service Program (DPCS) also engage students in direct service work for a nonprofit organization or public agency. Interns work full time for the organization or agency during a leave term or the summer following graduation and must devote at least 80% of their time to direct service. Interns are paired with Dartmouth alumni who mentor and meet regularly with the student. Students experience personal growth not only through direct service, but also through interactions with the mentor, a required reflection paper and discussions after they return to campus. Internships are initiated by students and can occur anywhere in the United States. The class will be recognized as the internship sponsor for each \$4,000 provided, and the Class President will receive a report on the students and projects supported by the class. (Cost: \$4,000)

Student Director and Civic Intern Positions–Tucker Foundation

The Tucker Foundation hires student directors and civic interns for a term to provide leadership and support for local, national, and international service and education programs. Student directors and civic interns work closely with Tucker Foundation staff and other students to plan and implement Tucker Foundation programs. Immersion in all aspects of the work of the Tucker Foundation helps students to develop leadership abilities and skills in such areas as advising, communication, marketing, program assessment, and research. Students work approximately 10 hours per week for 10 weeks. The class will be recognized as the position sponsor for each \$1,000 provided, and the class president will receive a report on the students and projects supported by the class. (Cost: \$1,000)

Undergraduate Research Project Grants–Dean of the Faculty of Arts and Sciences

Grants awarded by the Office of the Dean of the Faculty enable students to engage in independent research with a faculty mentor who can help guide their independent projects and give academic and career advice. Collaborating one-on-one with a faculty mentor gives students first-hand experience in an academic field while developing their critical thinking, information gathering and processing, and communication skills. Many research projects culminate in poster presentations in the spring or fall. The Office of the Dean of the Faculty awards grants ranging from up to \$1,500 for a senior honors thesis project to \$3,000 for a leave-term research project, and will report to the Class President on students and projects supported by the class. (Cost: \$1,500 to \$3,000)

First-Year Research Internships–Women in Science Project

Research internships sponsored by the Women in Science Project (WISP) provide opportunities for first-year women to work closely with a scientist over two terms and gain hands-on research and laboratory experience. These paid, part-time internships for women are part of a continuum of WISP activities open to all students to encourage persistence in the sciences. The experiences enhance students' understanding of the process of scientific inquiry, build their confidence in the laboratory, and introduce them to adult mentors and older peers who can provide academic and career guidance. Internships culminate in poster presentations at the annual Karen E. Wetterhahn Science Research Symposium, where students share their work and the excitement of doing science with others. The class will be recognized as the internship sponsor for each \$2,000, which will cover internship compensation and symposium costs, and the Class President will receive a report on the students and projects supported by the class. (Cost: \$2,000)

Public Affairs and Public Policy Internships–Nelson A. Rockefeller Center

Grants awarded by the Nelson A. Rockefeller Center for Public Policy and the Social Sciences enable students to gain direct experience at nonprofit organizations, governmental agencies, or other public offices at the local, state, and national levels. Grants support unpaid, leave-term internships that engage students in public policy research, public policy analysis, issue evaluation, or activities that help shape and determine public policy. The experiences introduce students to the public policy process and help them become better advocates for the causes about which they feel passionately. The class will be recognized as the internship sponsor for each \$3,000 provided, and the Class President will receive a report on the students and projects supported by the class. (Cost: \$3,000)

Policy Research Shop–Nelson A. Rockefeller Center

Students working in the Rockefeller Center's Policy Research Shop contribute to public policy debate in Vermont and New Hampshire by providing valuable, nonpartisan research to state legislators on critical issues facing each state. Projects begin in a public policy research course during the fall and often culminate with testimony before state legislative committees during the winter and spring. Class project funding in any amount up to \$10,000 will support up to 10 students working in the Policy Research Shop for one term. The class will be recognized as the sponsor of Policy Research Shop activities that term, and the Class President will receive a report on the nature of student research activity and testimony that term. (Cost: up to \$10,000)

Sophomore Summer Programs–Nelson A. Rockefeller Center

Students participating in the Rockefeller Center's First Year Initiative complete an introductory public policy course and a summer fellowship in the public and nonprofit sectors in Washington, D.C. First-Year Fellows are housed together in Washington and are paired with Dartmouth alumni mentors, and the experience fosters a sense of community among the students and strengthens their engagement in public policy issues. Upon returning to campus, First-Year Fellows work with Rockefeller Center staff to develop public policy-oriented programming for the sophomore summer that is student-initiated and student-directed. Potential activities that will be made possible by class project funds include grant writing training, a review of research methods, and weekly discussion groups. The class will be recognized as the sponsor of sophomore summer programming, and the Class President will receive a report on the activities supported by the class. (Cost: up to \$10,000)

Administrative Internships–Dean of the College

Administrative interns become closely involved with, and gain significant exposure to, daily operations of a College administrative office. Intern positions are currently offered in offices of the President of the College, Dean of the College, Alumni Relations, Career Services, Health Service, Collis Center and Pluralism and Leadership. Interns work for three terms and receive an annual stipend of \$2,500. Stewardship may include information and mailings from the benefiting office as well as correspondence from the supported student. (Cost: \$2,500)

Peer Advising Programs–Dean of the College

When students have questions, they often turn first to their peers, and the right answers can be crucial to the students' academic success and personal well-being. Peer advising programs organized by the Office of the Dean of the College give students information and the training that they need to better serve their fellow students. Trained peer advisors counsel students on a wide range of issues, including academics, substance abuse, eating disorders, and sexual violence. Class Presidents will receive reports on the activities supported; stewardship may include information and mailings from the benefiting office as well as correspondence from the supported student(s). (Cost: up to \$10,000)

Careers for the Common Good–Dean of the College

Although Dartmouth has a long tradition of educating people to become leaders in the global marketplace, students can find it difficult to identify the public and nonprofit sector careers that match their passions and values. The Careers for the Common Good program empowers and supports students in the pursuit of values-driven work opportunities in the not-for-profit, public, and private sectors. The Careers for the Common Good Intern organizes dinners with guests from these fields, maintains an e-mail bulletin, and assists with the *Make a Living/Make a Difference* guides. Stewardship may include information and mailings from the benefiting office as well as correspondence from the supported student. (Cost: up to \$10,000)

Dartmouth College Athletic Sponsor Program–Dean of the College

More than 1,200 Dartmouth alumni, parents, and others are members of the Athletic Sponsor Program, which provides vital recruiting resources for all of the Athletic Department's varsity sports. The Sponsor Program is the sole source of funds for bringing approximately 300 top athletic prospects to campus each year for a firsthand view of the Dartmouth Experience. Sponsor funds also support recruiting brochures, rental cars, and coaches' recruiting trips. Any excess income may be transferred into the program's endowment for long-term support of recruiting efforts. Stewardship will include regular correspondence regarding benefiting potential student-athlete(s) and related Athletics mailings. (Cost: up to \$10,000)

Pluralism and Leadership Program Fund–Dean of the College

Gifts to this fund will support initiatives that prepare students for leadership roles in an increasingly diverse and complex world. Participation in these programs, primarily administered by the Office of Pluralism and Leadership, helps students translate their undergraduate experiences into real-world skills for use in their careers and communities. One such program is the Diversity Peer Leadership Program, which brings three groups of 15 students together for an intensive weekend training experience. The intensive experience provides essential information, support, and skills to students committed to diversity initiatives. Stewardship may include information and mailings from the benefiting office as well as correspondence from the supported student. (Cost: up to \$10,000)

Dartmouth Outing Club–Dean of the College

For more than nine decades, the Dartmouth Outing Club has played an important role in linking Dartmouth students to the outdoors, in developing student leaders, and in fostering community among generations of students. With over 1,300 student members and almost as many non-student members, the Dartmouth Outing Club is the nation's oldest and largest collegiate outing club. To preserve the tradition of this student-led program, funds are needed to keep pace with increased costs in transportation, equipment, and other operating expenses. Stewardship may include information and mailings from the Dartmouth Outing Club. (Cost: up to \$10,000)

Class Gifts

Overview of Class Gifts

Class gifts are amounts larger than \$10,000 that are raised through individual solicitations of classmates and/or through a broad-based solicitation outside of the dues collection process. Except in unusual cases, the College strongly discourages classes from engaging in this fund-raising activity. The reason for this is two-fold:

- 1) The primary vehicle for class fund raising is through the Dartmouth College Fund. Almost 2,000 alumni volunteer leaders, with representation from every class, work diligently every year to raise gifts through the Fund;
- 2) Large class gifts are very difficult to complete. In order for a class gift to be successful, the gift needs to be started with one or two key lead donors who fund at least ½ of the gift and set the example for others. The *least* successful class gifts have used a broad fund raising approach that results in many smaller gifts but not enough to complete the class gift. In a worst-case scenario, the class finds itself “saddled” with a class gift that it cannot complete.

Setting Up Class Gifts

In order to set up a gift, classes should take the following steps:

- Classes should contact the Executive Director of the Dartmouth College Fund to identify projects that are of interest to the class and congruent with their goals and needs.
- The Executive Director facilitates a conversation between the offices of Development and Alumni Relations and the class leadership to ensure that the purpose of the class gift is consistent with the priorities set by the College to meet its mission of educating the most promising students and preparing them for a lifetime of learning.
- Once the purpose of the gift is established, the class and the Office of Development determine who should be approached within the class for the larger gifts to “jumpstart” the fund raising and set the example for other donors who will follow. Since it is likely that the Office of Development is already in conversation with these individuals, coordination is important. The actual solicitor may be a classmate or a professional staff fund raiser (if conversations are already in progress).
- Once commitments for the lead “seed” gifts are secured, ensuring success for the gift, the class chooses and endorses the project. The official endorsement will be a vote by the Class Executive Committee.

Operating Class Gifts

- Once the vote has taken place, a **Statement of Understanding** is prepared by the Office of Development for the Class President's signature. The Statement of Understanding names the class gift, outlines its purpose, and how the funds should be utilized.
- Once the lead "seed" gifts are secured, the class may choose to do a broader solicitation among a certain group of classmates or the whole class, depending upon the nature of the gift. The Executive Director of the Fund, or the staff class manager who works with the class's head agent, works with the Class to coordinate this approach.
- Once the **Statement of Understanding** is signed, the appropriate account number is set up by the Office of Gift Recording in Development. Gifts may be made directly to the office of Development via a check:
 - Dartmouth College
c/o Gift Recording Office
6066 Development Office
Hanover, NH 03755-3555

Or securities:

- Call the Dartmouth Investment Office at (877) 650-6956 or write to
- Dartmouth College Investment Office
PO Box 107
Hanover, NH 03755-0107

Or a wire transfer:

- Bank of America
63 South Main Street
Hanover, NH 03755
Name on Account: Dartmouth College
Beneficiaries on Account: Trustees of Dartmouth College
Account Number: 0000002-68887
ABA (Routing) Number: 0260-0959-3
ACH (Routing) Number: 011-400-495
or Swift Code (if foreign): BOFAUS3N

Class Gift Wish List

Class Scholarships – Office of Financial Aid

Making the Dartmouth experience accessible to every qualified applicant based upon their ability, and not their ability to pay, is a wonderful gift. Less than 15 institutions of higher education in the United States, including Dartmouth, are not only need-blind in their admission process but also guarantee to meet 100% of a student's demonstrated need for all four years. Classes may endow a class scholarship at the \$250,000 level. An endowment at this level will provide approximately \$12,500 annually in student scholarships. In addition, classes may fund a scholar each year through the Dartmouth College Fund with a gift of \$25,000. The full \$25,000 will be used in the year in which it is given for student scholarships.

Since both of these items are above the \$10,000 threshold, they are considered Class Gifts (see Section on Class Gifts). (Cost: \$25,000 or \$250,000).

Resources For Class Projects

- Dartmouth Alumni Relations Class Activities Staff
 - Patricia Fisher '81-Director of Class Activities (603) 646-3633, Patricia.Fisher@Dartmouth.edu
 - Rex Morey '99 Associate Director of Class Activities (603) 646- 2597, Rex.Morey@Dartmouth.edu
 - Jennifer Casey, Assistant Director of Class Activities (603) 646-2292, Jennifer.Casey@Dartmouth.edu
- The Class Treasurer's Association President or Vice President: Please see the website for current contact information: www.dartmouth.org/treasurers/
- The Class Treasurer's Best Practices document can provide guidance on collecting and managing funds: http://dartmouth.org/Treasurers/docs/Treasurers_best_practices.pdf

Resources For Class Gifts

- Dartmouth College Fund, Office of Development
 - Sylvia Racca '83a Executive Director, (603) 646-2198, Sylvia.Racca@Dartmouth.edu
- Dartmouth Alumni Relations Class Activities Staff
 - Patricia Fisher '81-Director of Class Activities (603) 646-3633, Patricia.Fisher@Dartmouth.edu
 - Rex Morey '99 Associate Director of Class Activities (603) 646- 2597, Rex.Morey@Dartmouth.edu
 - Jennifer Casey, Assistant Director of Class Activities (603) 646-2292, Jennifer.Casey@Dartmouth.edu

Appendix A: Class Projects Information (see Data Tables)

Appendix B: Examples of Class Gifts

Class of 1955 Tucker Foundation Fellowship Endowment Fund

- Established with gift of \$50,000 from Class of 1955
- Total raised to date: \$74,000

Class of 1957 Performing Arts Touring Fund at the Hopkins Center

- Established with gift of \$50,000 from the Class of 1957

Class of 1961 Legacy: The American Tradition in Performance - Endowment Fund

- Established during the Will To Excel Campaign with gifts of \$10,000 the Class of 1961
- Total raised to date: \$488,000

Class of 1962 Writing and Rhetoric Program Fund

- Established with two anonymous gifts totaling \$50,000
- Total raised to date: \$66,000

Class of 1967 Space for Dialogue

- Established with gift of \$75,000 from Class of 1967
- Total raised to date: \$144,000

Class of 1960 Endowed Scholarship

- Established in 1995 with a gift of \$218,000 from the Class of 1960