The Wellesley Fund Volunteer Guide

2024–2025





TABLE OF CONTENTS

Welcome from the Chair of The Wellesley Fund 1

The Critical Role of The Wellesley Fund 2

Volunteering for The Wellesley Fund 4

Peer Solicitation Tips 6

GiveCampus Volunteer Management System 9

Our Volunteers at Work 10

Volunteering in a Reunion Year 12

Giving Societies 16

Frequently Asked Questions 18

Key Terms and Definitions 20

The Wellesley Fund at Work 24

How to Give 26

Contact Us 26





WELCOME FROM THE Chair of The Wellesley Fund

Dear Volunteers,

Thank you for volunteering on behalf of your class to raise vital support for The Wellesley Fund! Your dedication and efforts play a crucial role in maintaining the economic health of our beloved alma mater, and we truly appreciate your commitment.

As volunteers you are the lifeblood of our fundraising initiatives, ensuring that Wellesley can continue to provide exceptional opportunities to current and future students. Each gift you help secure makes a tangible difference, from funding financial aid and academic programs to supporting our faculty and campus facilities.

Your passion and engagement also strengthen our alumnae community—you inspire others to give back and foster a spirit of generosity and shared responsibility. The Wellesley Fund thrives because of the time, energy, and heart you invest in this important work.

Thank you once again for your invaluable contributions. Together, we can continue to uphold the legacy and excellence of Wellesley College.

With deep gratitude,

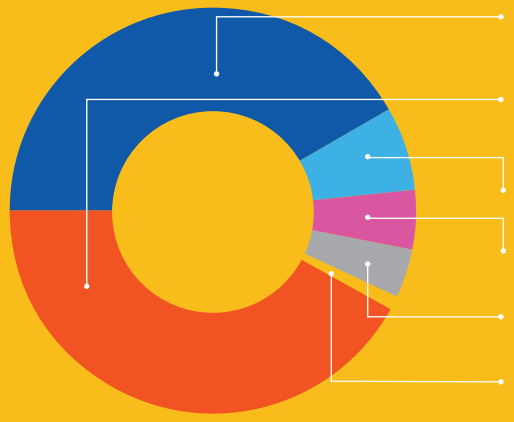


Melody Pao '11
Chair, The Wellesley Fund

THE CRITICAL ROLE OF The Wellesley Fund

Wellesley relies on the generosity of alumnae, families, and friends to support the College's mission to provide an excellent liberal arts education to students who will make a difference in the world. The Wellesley Fund provides critical flexible funds that can be used to address urgent needs and seize unique opportunities.

FY23 OPERATING REVENUE TOTAL: $260.9 MILLION



$109.8M (42%)
Endowment distributed for operations

$108.7M (41.6%)
Tuition, fees, room and board, net of financial aid

$17.4M (6.7%)
Other

$12.5M (4.8%)
Gifts to The Wellesley Fund

$9.7M (3.7%)
Grants

$2.8M (1.1%)
Other Gifts

CAMPUS PRIORITIES

Areas of Greatest Impact

Gifts to The Wellesley Fund allow the College to quickly and effectively develop promising programs that improve the student experience.

Financial Aid and Scholarship

Expanding access to education is one of Wellesley's highest priorities. The College is committed to meeting the calculated financial need of every enrolled student. This assurance is essential to Wellesley's ability to attract the highest caliber of applicants of all backgrounds, regardless of their economic status.

Equity and Inclusion

A defining feature of the Wellesley experience is living and learning among one of the nation's most diverse student bodies. The diversity our students represent across race, ethnicity, socioeconomic status, and geography creates a transformative educational opportunity for all.

Residential Life Experience

The residential program at Wellesley seeks to increase students' self-awareness and their sense of inclusion and belonging on the wider campus. To accomplish this, our resident assistants and house presidents receive extensive training in leadership, mental health first aid, and group facilitation and engagement.

Student Health and Wellness

Wellesley is committed to the holistic success of our students both in and beyond the classroom. They are able to cultivate lifelong practices of personal well-being through our wide range of physical and mental health resources, education, programming, and outreach.

Teaching and Research

Wellesley's excellence rests on its outstanding faculty and its rigorous academic program. Our students have the rare opportunity to learn from accomplished scholars and researchers whose engagement in their fields illuminates the undergraduate experience and empowers them to investigate the world.



VOLUNTEERING FOR The Wellesley Fund

Each class has at least one Wellesley Fund representative. Classes are encouraged to build a robust team of assistant representatives and Durant representatives, as well. The Wellesley Fund staff is available to assist representatives with recruiting additional classmates to serve.

Class Representative

Collaborates with The Wellesley Fund team to build and support a committee of assistant representatives, solicit their peers for gifts to The Wellesley Fund, and implement strategies that will inspire their classmates to give.

Assistant Representative

At the direction of the class representative and The Wellesley Fund team, solicits a pool of assigned classmates for gifts to The Wellesley Fund.

Class Durant Representative

Collaborates closely with the class representative and The Wellesley Fund team to solicit a select pool of assigned classmates for Durant Society-level gifts to The Wellesley Fund.

> "Being a new class representative allows me to be in touch with many from my class. Seeing a classmate, even on paper, can be a wonderful experience."
>
> — DIANA GALE '63, class representative

VOLUNTEER Responsibilities

- Make a personally meaningful gift to The Wellesley Fund each fiscal year.
- Attend an annual volunteer orientation, or watch the recording.
- Conduct periodic outreach to an assigned pool of classmates, including sending at least four solicitations per fiscal year.
- Use the GiveCampus volunteer management system (VMS) to manage volunteer efforts.
- Work closely and collaboratively with The Wellesley Fund staff on strategies to motivate classmates to give.
- Agree to abide by The Wellesley Fund Volunteer Agreement, available within the GiveCampus VMS.

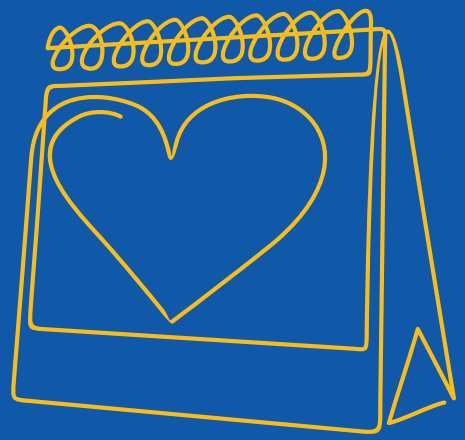
KEY VOLUNTEER OUTREACH Periods

NOVEMBER
Wellesley's annual day of giving

DECEMBER
End of calendar year

APRIL & MAY
Pre-reunion

JUNE
End of fiscal year



PEER SOLICITATION TIPS

A NOTE ABOUT COMMUNICATION STYLES AND FREQUENCY

The way you ask a classmate for a gift will depend on the nature of your relationship. For some classmates, sending a quick text will work. For others, picking up the phone to catch up before the solicitation makes sense. And for many, emails from the VMS will suffice. However you choose to be in touch with classmates, note your activity in the VMS. Be open to using different modes of communication to reach them, and know that they may need to be asked more than once to make a gift. The Wellesley Fund team suggests reaching out to classmates at least four times a year or until a gift is made.

MAKING THE ASK

Lead by Example

Before asking for a gift, make your own. Consider sharing the reasons you give to The Wellesley Fund with your classmates.

Reach out, (Re)connect, and Build Rapport

Choose your mode of communication (email, phone, text), and introduce yourself. Express warmth, but be forthcoming about your role with The Wellesley Fund. Have fun catching up and let your enthusiasm and love for Wellesley shine!

Make the Case for Support

Gifts to The Wellesley Fund are deployed right away and thus have immediate impact. These gifts are used to address urgent needs and seize unique opportunities, ensuring the legacy of a Wellesley education endures. The Wellesley Fund team develops an annual "ask amount" customized for every alum based on their demonstrated giving behavior. We encourage volunteers to use the ask amount in personalized communications to complement what alums receive in their appeals from The Wellesley Fund.



Express Gratitude

Thank your classmate for their time and for their consideration of your request to make a gift.

Follow Up

If your classmate needs more time to think about a gift, make a note to yourself to follow up later. Many classmates will need to be asked more than once, or will need a reminder to follow through on making a gift they committed to.

Say Thanks!

The VMS will alert you once an assigned classmate has made a gift so that you can send them a thank-you note.



GIVECAMPUS
Volunteer Management System

The GiveCampus volunteer management system (VMS) empowers The Wellesley Fund volunteers to easily engage peers by bringing classmate data and peer-to-peer outreach tools together in one centralized and secure place.

KEY FEATURES

- **Personalized templates to email many classmates at once or one classmate at a time**
- **Filters to segment communications to specific classmates or groups**
- **A place to capture notes and keep track of gift conversations**
- **Real-time gift notifications**
- **Access to the campaign dashboard for Wellesley's annual Day of Giving**
- **Resource library to aid in peer solicitation**

A recorded VMS orientation is available on demand in the GiveCampus resource library. All volunteers are required to use the VMS to conduct and/or record their outreach.

To log into the VMS, please visit:
www.givecampus.com/schools/WellesleyCollege/login

OUR VOLUNTEERS AT WORK!

NEARLY
200
VOLUNTEERS COVERING
70
CLASSES

IN FY24
VOLUNTEERS SENT
34,000
EMAILS THROUGH
THE VMS

DURING THE 2023 DAY OF GIVING, VOLUNTEERS SENT 7,884 EMAILS, HELPING TO RAISE
$477,798

FY24 EMAIL SOLICITATIONS FROM VOLUNTEERS HAD A
17%
HIGHER OPEN RATE THAN WELLESLEY'S BROAD-BASED APPEALS

VOLUNTEERS ATTENDED ORIENTATIONS, HEARD FROM COLLEGE LEADERSHIP, AND HAD MEETUPS IN WASHINGTON D.C., NEW YORK CITY, AND BOSTON.

IN FY24 38 CLASSES FIELDED A TEAM OF VOLUNTEERS TO ENGAGE WITH THEIR CLASSMATES.

"The years do seem to go by faster than ever now, and we're still not sure if that's because we're getting older, have been around a while, or because things just move faster in this personal-technology-centric age. Regardless of the technology and speed issues, or perhaps because of them, we find ourselves feeling for current students in these trying times on many campuses. And we find ourselves thankful that Wellesley is, well, Wellesley."

—MELISSA KING '92, assistant representative



VOLUNTEERING in a Reunion Year

Reunion is an opportunity for alums to reflect on and celebrate their time at Wellesley. Classes come together to fundraise for a reunion gift to the College, ensuring the Wellesley experience is available to future generations of students.

The Wellesley Fund team works closely with class volunteers on special reunion-specific appeals in the year leading up to reunion weekend. Some classes choose to expand their volunteer group in a reunion year to increase class engagement, build momentum, and earn one of the reunion cups.

The Reunion Gift

The reunion gift is the sum of nearly all new gifts, pledges, and planned gifts members of a class have made to the College since their last reunion. Though volunteers are asking classmates for gifts to The Wellesley Fund, the five-year reunion gift total recognizes gifts to all designations across the College.

Reunion-year Goals

The Wellesley Fund team will support classes that wish to develop and set goals to motivate their classmates to give.

Participation

Participation is calculated by dividing the number of classmates who make a gift of any size to Wellesley in the reunion year by the class solicitable base. This figure is used to determine the winner of the annual Participation Cup.

Durant Donors

With any gift of $2,500 or more (or $500 for the fifth reunion and $1,000 for the 10th reunion) alums become members of the Durant Society for their reunion year.

The Wellesley Fund Total

Any gift made to The Wellesley Fund in the reunion year counts toward the annual Wellesley Fund total.

"At reunion, I made sure to visit our lovely yellow tulip class tree, which is now big and strong, standing tall on the edge of Severance Green along with the other class trees — some over a hundred years old. I was reminded that we are a part of a special community, no matter where we may be."

— DEE DEE CHEN '03, class representative





REUNION CUPS

The following reunion giving awards are announced at the Alumnae Association Annual Meeting during Reunion Weekend.

The Wellesley Fund Cup

For the reunion class achieving the largest increase in giving to The Wellesley Fund since their last reunion.

Participation Cup

For the reunion class achieving the highest giving participation rate in the reunion year.

5th Reunion Cup

Awarded to the fifth reunion class that secures 250 or more donors.

25th Reunion Cup

Awarded to the 25th reunion class that surpasses the College record for largest number of Durant Society donors ($2,500 and up) to any aspect of the College since their last reunion.

50th Reunion Cup

Awarded to the 50th reunion class that surpasses the College record for giving through a combination of outright and planned giving since their last reunion.





GIVING SOCIETIES

Durant Society

Wellesley's leadership giving recognition society, the Durant Society, has four giving levels, with adjusted amounts for recent alums. Durant Society membership and benefits are active from the date of the gift through the end of the current fiscal year. To maintain membership, donors must continue to give at the Durant Society level each year.

President's Circle Benefactor
$25,000 and up

President's Circle
$10,000 to $24,999

Dean's Circle
$5,000 to $9,999

Supporter
Graduated 11 or more years ago
$2,500 to $4,999

Graduated six to 10 years ago
$1,000

Graduated one to five years ago
$500

Legacy Society

Founded in 1991, the Legacy Society celebrates alumnae, parents, and friends of the College who, through their planned gifts, have shown their leadership and commitment to the future of Wellesley. Creating a legacy for Wellesley provides transformational opportunities for our students, preparing them to be tomorrow's leaders. To become a member, donors must notify the College that Wellesley is included in their estate plans.







FREQUENTLY ASKED QUESTIONS

About Giving to The Wellesley Fund

Why should I give to The Wellesley Fund?
You know the many ways your experiences at Wellesley have enriched your life—the inspiring professors, rigorous academics, meaningful relationships, supportive community, and beautiful campus environment prepared you to make a difference in the world. The Wellesley Fund provides critical and flexible funds to address urgent needs and seize unique opportunities to make that same foundation available to young scholars today.

Can my gift really make a difference?
Yes! All gifts make a difference. A gift to The Wellesley Fund is a vote of your confidence in the College and support of your class. Last year, alums contributed $11.3 million in immediate-impact gifts to The Wellesley Fund.

Wellesley has a big endowment. Why should I give?
The endowment provides an essential source of operating funds for the College, the vast majority of which is restricted to specific purposes selected by the donors, such as professorships or scholarships. Through careful investment, endowed gifts ensure Wellesley maintains a strong financial foundation to support students today and 100 years from now. Gifts to The Wellesley Fund offer the College the flexibility to meet the emerging needs of our students and campus community in real time.

I want to direct my gift toward a specific purpose that matters to me. What are my options?
We have new ways to allocate your gift to The Wellesley Fund. Visit *wellesley.edu/twf* to select a designation that matters to you.

I'm concerned about the rising cost of tuition. Why should I give?
The cost of tuition at Wellesley has increased, as it has at most other academic institutions, and student loan debt is a national concern. Wellesley is committed to need-blind admission and to removing financial barriers for all admitted students by meeting 100% of their calculated need. Over the past decade, we have increased the total financial aid awards offered to Wellesley students by 60%. A gift to The Wellesley Fund broadens access to a Wellesley education for students from all socioeconomic backgrounds.

About Personal Circumstances

I am paying student loans and can't afford a gift right now. How can I give?
All gifts matter. We encourage alums to make a gift at a personally meaningful level based on current financial circumstances. A few options to think about to stretch beyond what you think is currently possible include exploring if your employer offers a matching gift program or considering a monthly recurring gift.

I am retired and am not sure I can make a big contribution. What are my options?
You can consider several options for preserving your assets and providing for Wellesley. If you are over 70½, you can use your qualified charitable distribution from your IRA to make a current-use gift to The Wellesley Fund. You could also establish a multiyear pledge. Other options include life income gifts or documenting your estate plans with the College, but these options do not support The Wellesley Fund. Contact our gift planning team to learn more at giftplanning@wellesley.edu.

I don't feel connected to Wellesley or my class anymore. How can I get back in touch?
Having a Wellesley connection is a wonderful bond that creates a community wherever you are. A few ideas:

- Keep up with your local Wellesley club to learn about programs and events in your area.
- Wellesley's shared identity groups bring alums closer to the College and each other based on their common inherent and intrinsic identities.
- Wellesley recently relaunched the alumnae travel program.
- Reunion is a good opportunity to connect with classmates. Some classes also hold Zoom meetings or local mini reunions.
- Volunteering with the WCAA or The Wellesley Fund is a great way to keep in regular touch with the College and your classmates.

KEY TERMS AND DEFINITIONS

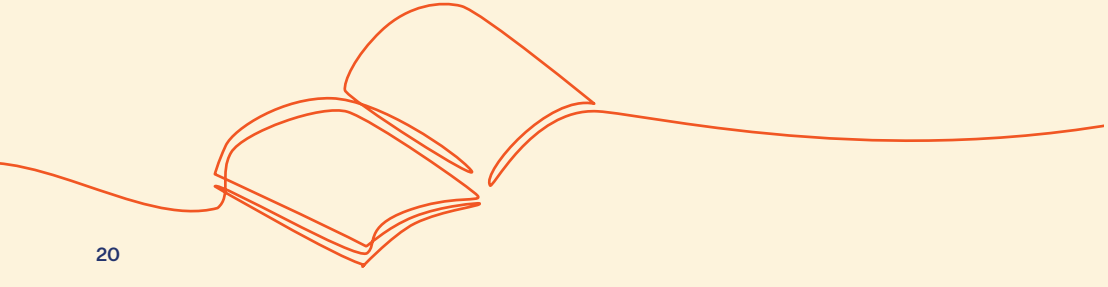
Anonymous Gift
A donor may specify that a gift be anonymous, meaning they do not wish to receive public recognition for it. Anonymous gifts will be credited toward the donor count and fundraising totals for your class, but you will not see anonymous gifts in constituent records within the VMS.

Ask Smount
The ask amount is the amount a prospective donor will be asked for in appeals throughout the current fiscal year. Ask amounts are set at the beginning of the year and used consistently throughout that year. These amounts are carefully calculated based on each individual's past giving history and a gift level increase strategy, using a data-informed formula created by industry experts.

Calendar Year
January 1 to December 31. Many donors consider the calendar year when making their philanthropic decisions, which is why we have special outreach at the end of the year.

Class by Class (CxC) Report
The CxC report compares the performance of all Wellesley classes for the current and previous fiscal years. To view the report, visit the VMS, select "Resources," and find the section titled "Class by Class Report." The Wellesley Fund staff update the report periodically.

Deceased Alums
After we record a death of an alum, they will no longer be searchable in the VMS, be contactable through the VMS, or appear under your assignments (if they had been assigned to you). Gifts from deceased alums still count toward class fundraising totals. The CxC report will reflect the most accurate totals and may differ from your VMS dashboard.



Donor
Someone who made a gift in the current fiscal year. Typically, once someone becomes a donor, Wellesley will not solicit them throughout the year. We make exceptions from time to time for special initiatives or events, in which case staff liaisons will inform volunteers.

Endowment
Wellesley College, like most academic institutions, relies on a healthy endowment to generate the financial resources required to provide a high-quality education for students year after year. The College carefully invests gifts to the endowment with an eye toward strong financial returns, via investments that meet Wellesley's high ethical standards. Only income from the endowment fund may be spent, ensuring that the principal is preserved to benefit generations of students to come. Many endowment funds are restricted to a purpose specified by the donor, such as financial aid. The College has a legal obligation to spend and steward these gifts for their intended purpose in perpetuity.

Fiscal Year
Wellesley's fiscal year runs from July 1 to June 30.

Lapsed Donor
Someone who made a gift at some point in the past but has not done so in the last 10 years.

LYBUNT Donor
Someone who made a gift "last year but unfortunately not this year"—that is, who made a gift in the previous fiscal year but has not yet done so this fiscal year. Donors of this type are the easiest to persuade to renew as they have demonstrated a recent willingness to give.

Managed Prospect
Some alums are assigned to gift officers in the development office to navigate their Wellesley philanthropy. The VMS record indicates when a classmate is an assigned prospect. If you have questions about how to proceed with soliciting these classmates, please contact your class liaison.

(continued on next page)



Participation Rate
The participation rate at Wellesley is calculated by dividing the number of donors by the number of living, solicitable alums.

Solicitable Base
The solicitable base is the group of alums the College is able to solicit. We can solicit alums who have a means to be contacted and who have not opted out of solicitations from Wellesley College.

SYBUNT Donor
Someone who made a gift in “some year but unfortunately not this year.” SYBUNTs are the second-easiest donor type to reactivate after LYBUNTs, as they have demonstrated a relatively recent willingness to give to Wellesley College.

TWF
The Wellesley Fund

VMS
Volunteer management system. Wellesley uses GiveCampus, the most widely used VMS software in educational fundraising.

THE WELLESLEY FUND AT WORK

In today's fast-paced, ever-changing landscape of higher education, Wellesley is able to provide an excellent liberal arts education to students who will make a difference in the world thanks in part to having the financial flexibility to act quickly and seize emerging opportunities. Gifts to The Wellesley Fund support our students and the myriad academic programs and extracurricular opportunities they choose to pursue.

Our Students | 2023-2024

2,318
students enrolled in fall 2023

56%
of students identified as people of color

487
were first-generation college students

28.6%
of students identified as underrepresented minorities

322
students hailed from 91 countries

Financial Aid | 2023-2024

55%
of students received financial aid in FY23

$85M
in financial aid was awarded

$67K
was the average financial aid award

Academic Excellence | 2023-2024

50+
departmental and interdepartmental majors offered

8:1
student to faculty ratio, with a typical class size of 17 to 20 students

50%
of students declared at least one STEM major

76%
acceptance rate to medical school, well above the national average of 43%

60
faculty members have active grants, including 36 federally funded grants

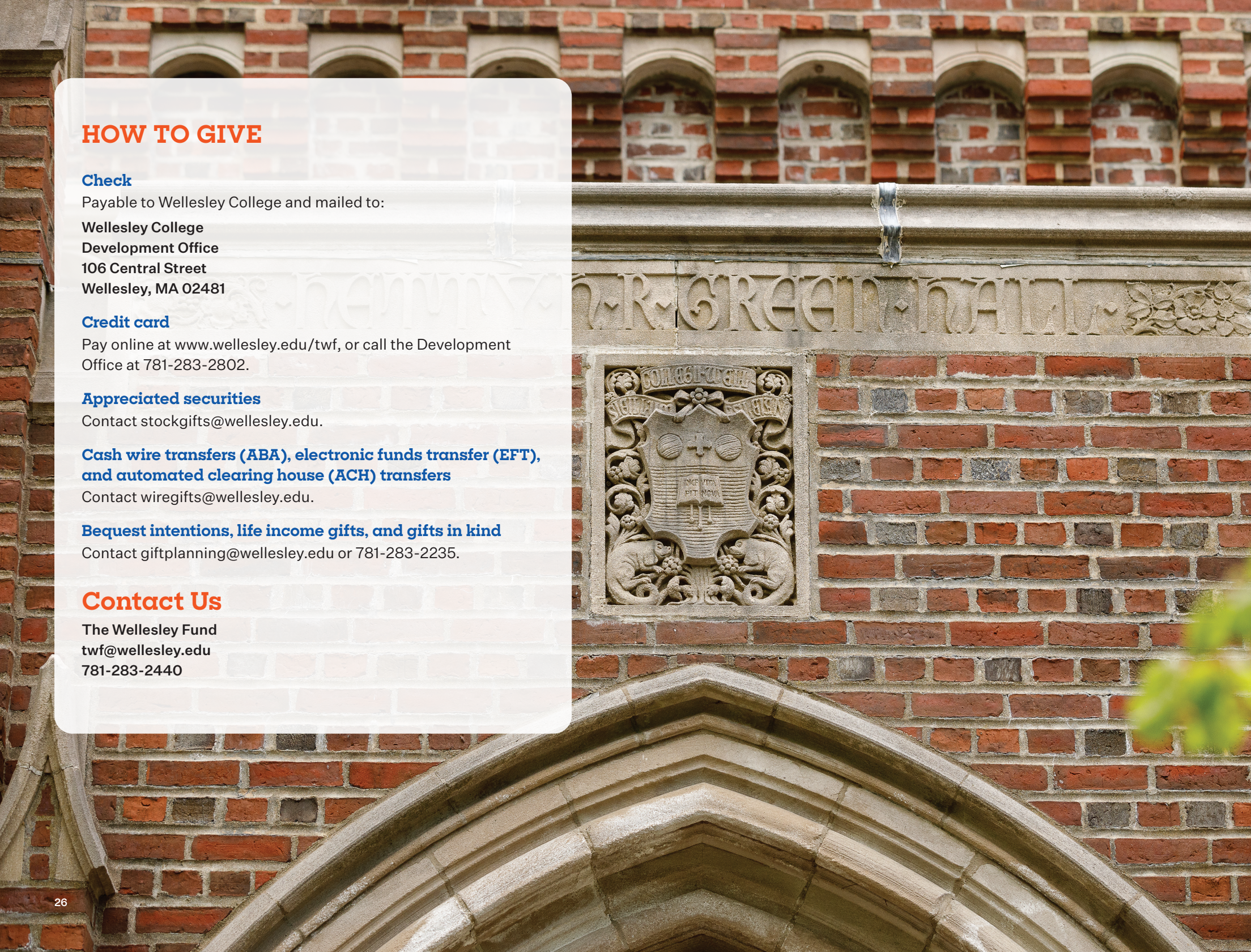
Majors with the Most Graduates Class of 2024

1. Economics: 76
2. Computer science: 59
3. Psychology: 52
4. Political science: 40
5. Neuroscience: 36

Residential Life Programing | 2023-2024

550
Residential life programs offered

More than
500
Students per semester engaged in workshops focused on sleep, stress management, or self-care strategies



HOW TO GIVE

Check

Payable to Wellesley College and mailed to:

Wellesley College
Development Office
106 Central Street
Wellesley, MA 02481

Credit card

Pay online at www.wellesley.edu/twf, or call the Development Office at 781-283-2802.

Appreciated securities

Contact stockgifts@wellesley.edu.

Cash wire transfers (ABA), electronic funds transfer (EFT), and automated clearing house (ACH) transfers

Contact wiregifts@wellesley.edu.

Bequest intentions, life income gifts, and gifts in kind

Contact giftplanning@wellesley.edu or 781-283-2235.

Contact Us

The Wellesley Fund
twf@wellesley.edu
781-283-2440



WELLESLEY