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Carleton College has been witness to important changes in function, goals, and results of the Alumni Annual Fund during the past 20 years. These changes began with a group of alumni who believed in the importance of annual giving and their roles as stewards of Carleton. They set out to increase the level of alumni support. In 1988, the alumni formed a Board of Directors and recruited volunteers from each class to coordinate fundraising efforts. In turn, Class Agents recruited Assistant Agents to help with personal solicitations. Peer solicitation is the focus of and key to the success of the Alumni Annual Fund. Volunteer involvement, initiative, and creativity are an institutional priority.

While most institutions depend to some degree on volunteer support, none boasts the level of ownership that Carleton’s alumni volunteers—well over 600 strong—have assumed in raising unrestricted dollars for the Alumni Annual Fund.
Carleton College AAF Alumni Giving Fiscal Year 1990 - 2007

Carleton College AAF Alumni Participation Fiscal Year 1990 - 2007
Financial Highlights for 2007 — 2008

Total Endowment (as of 6/30/07) : $663 million
Endowment per Student: $340,000
College’s Budget: $104 million

2007—2008 Fees
Tuition: $35,958
Room: $4,944
Board: $4,545
Student Activity Fees: $198
Total Comprehensive Fee: $45,645

• The average need-based Carleton grant is $22,258. Carleton met the full demonstrated financial need of all admitted students in the class of 2011. 246 members of the class are receiving more than $5.4 million in Carleton grants.

• More than $163 million additional endowment dollars would be needed to generate the $7.3 million of income provided this year by the Annual Fund.

• Carleton would have to increase tuition and fees per student by over $4,000 to cover the dollars raised by the Annual Fund.

• Tuition and fees cover approximately 48% of the actual cost of educating a Carleton student. The remaining 52% is subsidized by the College, annual gifts and earnings from endowment gifts.

• For the 36th consecutive year, Carleton’s budget was balanced.
What is Annual Giving at Carleton College?
Annual giving is a broad term referring to contributions made every year to support on-going college operations. These gifts provide resources for financial aid, faculty salaries, library acquisitions, lab and classroom equipment, guest lectures, academic programs, and other immediate needs. Gifts to the Alumni Annual Fund limit increases in tuition and fees, and make the cost of a Carleton education more affordable.

What is an unrestricted gift, and why is it so important?
Unrestricted annual gifts are those given without any limitations on their use. Restricted gifts, on the other hand, are earmarked for specific purposes, such as a gift to a single academic department, athletic program and other long-term projects.

Alumni who make unrestricted gifts allow Carleton to place resources where they are immediately needed, providing vital funds that impact every area of the College, especially during periods of increased fiscal pressure and restraints.

Why should I give money to Carleton when there are so many other pressing needs in the world and in my own community?
Many organizations need and deserve our ongoing support. A gift to Carleton College will not feed the hungry, house the homeless, or find a cure for AIDS. But it will, with our support, graduate men and women who, with the strength of skill and character and a belief in individual and civic action, make a difference in families, communities, organizations, and throughout the world.

As alumni, we are heirs and beneficiaries of countless alumni who came before us. Those alumni made financial commitments to Carleton so that it could continue to be one of the best liberal arts colleges in the world. If we believe that institutions like Carleton are valuable and essential, then it is our privilege and responsibility to sustain our valued tradition of stewardship.

Why doesn’t the College just tighten its belt?
Carleton controls its expenditures very carefully. Financing an educational enterprise is not the same as managing a business. Since each student’s education is highly subsidized by the College, belt-tightening can only help at the margins. The College is a prudent manager of all its resources and is committed to keeping Carleton fiscally sound today and in the future without compromising its standards of excellence.
CLASS AGENT
In addition to soliciting for the Alumni Annual Fund, class agents cultivate relationships with classmates and encourage them to reconnect to the College. Sharing this responsibility with one (or more!) co-agents will enable class leaders to benefit from the segmentation strategy and divide the various tasks throughout the year.

Many classes have found it to be very effective to split duties into two categories: participation and leadership giving. The co-agents are jointly responsible for overall class strategy and assistant agent management, but this model allows for each person to focus on one area of expertise. This does not mean that gift agents can only solicit leadership gifts and the participation agent is solely responsible for securing participation gifts. The two agents, along with the assistant agents, work as a team to get the best performance from the class as possible. The dual-agent model is intended to clearly define roles.

Gift Agent responsibilities include:
- Making an early financial commitment to the Alumni Annual Fund.
- Developing a solicitation strategy in conjunction with the Participation Agent.
- Assisting in writing/editing the fall solicitation letter.
- Recruiting additional assistant agents.
- Overseeing and participating in TOPS solicitation by the October 1 deadline.
- Contacting assistant agents frequently to monitor progress and provide assistance and encouragement as needed.
- Tracking leadership gifts throughout the year, and following up on fall solicitations before December 1 if no gift is received.
- Identifying and cultivating additional leadership prospects from other segments.
- Maintaining regular communication with the Participation Agent, AAF staff, and AAF Board regarding solicitation progress.
- Identifying and recruiting successor.
- Attending the Alumni Stewardship Workshop each year.

Participation Agent responsibilities include:
- Making an early financial commitment to the Alumni Annual Fund.
- Developing a solicitation strategy in conjunction with the Gift Agent.
- Assisting in writing/editing the fall solicitation letter.
- Recruiting additional assistant agents.
- Overseeing and participating in peer solicitations with a focus on increasing class participation.
- Assessing participation strategy (mailings, calls, emails, etc.) throughout the year and adjusting as necessary.
- Contacting assistant agents frequently to monitor progress and provide assistance and encouragement as needed. Organizing occasional conference calls if necessary.
- Maintaining regular communication with the Gift Agent, AAF staff, and AAF Board regarding solicitation progress.
- Identifying and recruiting successor.
- Attending the Alumni Stewardship Workshop each year.
ASSISTANT AGENT
Assistant agents serve as a fundraising team under the direction of the class agents, sharing the responsibility of keeping in touch with fellow classmates and asking them to support the College through a gift to the Alumni Annual Fund. These assistant agents may choose to solicit for either leadership gifts or participation gifts, depending on their comfort level. Of course, they may be involved in both types of soliciting, if they so choose.

Assistant Agent responsibilities include:
- Making an early financial commitment to the Alumni Annual Fund.
- Assisting the class agents by contacting classmates and soliciting their financial support.
- Offering input and suggestions to help craft the solicitation strategy throughout the year.
- Updating the class agents and the AAF staff on the progress of their solicitations. This also includes passing along any biographical information that may be of interest to the College such as changes in address, employment, or marital status; the birth of children; and advanced degrees earned.
- Attending the Alumni Stewardship Workshop each year.

GIFT COMMITTEE MEMBER
As a class nears its reunion, Alumni Annual Fund staff and Board members work with class agents to recruit and organize a class Reunion Committee. This committee is comprised of class members interested in both fundraising and program activities. Generally, the class agents or the gift committee chairs will recruit gift committee members from the class.

Gift committee members are often, but not limited to, those class members who have served as assistant agents during non-reunion years. Because the dollar and participation goals in a reunion year are significantly higher than in other years, gift committee and program committee chairs depend on a large group of committee members to ensure a successful class reunion.

Gift Committee Member responsibilities include:
- All the responsibilities of an assistant agent (see above).
- Putting an added emphasis on soliciting S-T-R-E-T-C-H gifts in honor of reunion.
- Attending the Reunion Planning Workshop in August.

AAF BOARD MEMBER
The Alumni Annual Fund Board of Directors is ultimately responsible for the Fund’s direction, goals, and policies, and serves as a valuable resource for class agents and AAF staff. The staff and Board members work together to provide time-tested ideas and methods of fundraising to class agents and assistant agents, as guidance for developing their own class fundraising strategies. See page 16 for current Board members and contact information. Alumni serving on the Board represent a wide range of class years and have demonstrated a history of volunteer leadership and strong commitment.

AAF Board Member responsibilities include:
- Fulfilling a term of 3 years, with option to renew.
- Making an early financial commitment to the Alumni Annual Fund.
- Soliciting lead gifts from class agents early in the fiscal year.
- Attending the semi-annual board meetings in late summer and winter.
- Participating in conference calls with fellow board members and AAF staff throughout the year.
- Maintaining a good working relationship with class agents throughout the year, and establishing a schedule of regular communication.
- Attending the annual Reunion Planning Workshop and Alumni Stewardship Workshop.
- Working with AAF staff managers and class agents to recruit successors.
Use the calendar below to coordinate all solicitation mailings and tasks.
- Schedule any additional mailings (letters, postcards, email, etc.) to be sent to your class, including the author and a deadline for a draft.
- Schedule additional deadlines or tasks as needed.
- Schedule conference calls, indicating who will be on the call and the purpose of the call.

<table>
<thead>
<tr>
<th>Solicitation Mailings</th>
<th>Solicitation Tasks</th>
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| **Class Solicitation Letter** draft due at CAVE  
*Class Solicitation Letter* mailed | August & September  
Recruit additional Assistant Agents, if necessary  
Solicitation of assignments begins  
Volunteers make own AAF commitment |
| **Elements** mailed with gift envelope to all alumni | October  
Solicitation of TOPs completed by Oct. 1  
Check the AAF volunteer portal for updates |
| **Opening Doors** mailed to non-donors | November  
Solicitation of Volunteers completed by Nov. 1  
Check the AAF volunteer portal for updates |
| **Calendar Year End Solicitation** sent to non-donors | December  
Solicitation of assigned classmates, Groups A—E completed by Dec. 31  
Check the AAF volunteer portal for updates |
| “Volunteer for Carleton” stewardship event | January  
3s and 8s begin pre-Reunion planning meetings  
Check the AAF volunteer portal for updates |
| **Opening Doors** mailed to non-donors | February  
Complete all solicitations to meet March 15 cut-off for Preliminary Donor Letter  
Check the AAF volunteer portal for updates |
| **Preliminary Donor Letter** mailed to all alumni | March & April  
Check the AAF volunteer portal for updates |
| **Opening Doors** sent to non-donors & non-pledgers  
Targeted email & letter solicitations | May  
Check the AAF volunteer portal for updates |
| **Pledge Reminder** with **Opening Doors** insert mailed to all pledgers on June 1  
Targeted email solicitations by class and College | June & July  
Check the AAF volunteer portal for updates  
FISCAL YEAR ENDS JUNE 30  
Final results reported to volunteers mid-July |
**AAF Class Giving Cycle**

**Reunion**
- Encourage high attendance at the Reunion Planning Workshop
- Secure early pledges from volunteers and leadership donors
- Set up communication plan for Gift Committee (& full committee)
- Communicate with class through letters, email, and class web site
- Assign and personally solicit 1/3 to 1/2 of the class
- Solicit stretch gifts (3-10 times last gift)
- Increase participation by 10%
- Increase class gift by 112%

**Pre-Reunion**
- Confirm or recruit strong Gift Committee leadership
- Recruit and retain Assistant Agents for an effective and diverse gift committee
- Core Gift Committee members meet by March
- Evaluate last Reunion and determine how best to face potential challenges
- Broaden class engagement through high participation
- Increase class gift by 5—10%

**Every Year**
- Attend the Alumni Stewardship Workshop
- Increase class participation
- Confirm all Assistant Agents
- Maintain continuity in solicitation assignments
- Maintain regular communication between volunteers and AAF
- Consider new use of technology in fundraising efforts
  - Friendraising

**Post-Reunion**
- Recruit or confirm new Class Agents to lead the class through the next reunion
- Confirm continued involvement of Gift Committee members
- Keep interest and momentum going from Reunion
- Maintain or increase level of classmates’ pre-reunion gifts
- Maintain high level of participation from Reunion
- Plan a mini-reunion event
- Increase class gift by 20% over pre-reunion year

**Reunion 2 Years Out**
- Class Agents in place to lead the class through the next Reunion
- Recruit and retain Assistant Agents with an eye toward future gift committee structure; include top donors
- Identify core group of gift leaders to attend next workshop
- Maintain strategy for Group Cs
- Plan a mini-reunion event
- Increase class gift by 5—10%

**Reunion 3 Years Out**
- Recruit and retain Assistant Agents to maintain diversity and enthusiasm
- Consider upcoming Reunion Gift Committee leadership
- Develop strategy for Group Cs that last gave in your Reunion year
- Plan mini-reunion event
- Increase class gift by 5—10%
Groups are based on donor giving patterns, and allow volunteers to focus on the segment that is most beneficial for the class’s situation. Deciding which segments to focus on may be largely based on where your class stands in the reunion cycle. For example:

- If you are in a post-reunion class, you can most likely focus all of your volunteer efforts on your TOPs and retaining your Bs. It is unlikely (although possible) that the volunteers need to focus on Cs, Ds, or Es after all the extra effort put forth during your reunion year.
- If your class is trying to increase participation, it’s time to zero in on the Cs (classmates who have given once in the past few years) and see if you can once again bring them back into the giving habit.
- If your class is striving to raise more dollars, focus on the TOPs. You can also look at the As to see if some might be primed for an upgrade.

TOPs classmates are defined as the top 25 or so prospects in the class based on ask amount. The solicitation of this group should be personal, and is most effective when undertaken by the solicitor who is most familiar with the donor. The solicitation is more compelling when the solicitor has made their own gift commitment prior to the contact.

Group A classmates are those who have 5 or more years of consecutive giving. They are your most consistent and loyal donors and are considered the best group from which to identify any new potential leadership donors.

Group B classmates are those who have 1 - 4 consecutive years of giving. While you may move members of this group to the TOPs group, the primary focus should be to ensure their giving becomes a well-established habit.

Group C classmates are those who have given at least once in the past 5 years, but not last year. TOPS prospects may be found in this group, but the main goal should be to encourage them to resume their giving to the AAF.

Group D classmates are those who have given to the AAF at least once in their lifetime, but not in the last 5 years. Potential leadership gifts may be found in this group, but they should primarily be cultivated for participation purposes.

Group E classmates are those who have never given to the Alumni Annual Fund. This group should be cultivated to make their first gift to Carleton's Alumni Annual Fund.
What is the Student Calling Program?

It is a team of enthusiastic and dedicated Carleton students who want to help with your class gift! Approximately 30 students call alumni during 34 weeks of the fiscal year to solicit gifts for the Alumni Annual Fund. These students receive ongoing training and are effective fundraisers.

The goal of the program is to increase participation by cultivating responses from alumni who won’t otherwise be contacted by a classmate. Student callers are given an outline of important points to cover during the call, but they are encouraged to develop their own style and make each phone call unique. Regardless of the outcome of the phone call, the students re-establish a link between alumni and the College, perhaps opening a door to AAF gifts in the future.

The calling program is automated, which allows for more efficient calling and tracking of results, and utilizes progressive dialing. This means that computers dial for the students, calling one alum at a time, allowing the student to focus on that solicitation. Many telemarketing firms use predictive dialing. With predictive dialing, one computer dials many phone numbers at once and as the calls are answered, they are distributed to the callers. Carleton’s phone system does not use predictive dialing.

How can the student callers help our class?

Despite a concerted effort, Class Agents and Assistant Agents are rarely able to personally solicit each and every one of their classmates. The students can help! They work with you to solicit those who may not be called by a classmate. Although student calling doesn’t compare to the effectiveness of a solicitation by a classmate, personal contact is one of the best ways to raise money. This year, calling will start on September 16, 2007 and will end on June 30, 2008.

We look forward to working with you throughout the year to make your class gift successful!
ALUMNI ANNUAL FUND BOARD

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Solicitation Resources
A truly effective solicitation is a process, not a single call or email. It means developing a relationship over time and following up as often as necessary. The following is an outline of how to approach your solicitations and make them as effective as possible.

**PREPARATION**
Consider why Carleton is important to you, and why your classmates will want to support the College. You should feel good about this discussion and ultimately the solicitation! Remember:

- You are contacting your own classmates, many of whom are your friends. Their interest in Carleton is very likely similar to yours.
- You are asking your classmates to support one of the finest educational institutions in the country.
- Most people enjoy giving to a worthwhile cause and will respond willingly. Donors also enjoy seeing the good accomplished by their gifts. Present your classmates with an opportunity to give rather than an obligation or argument.
- Most people tend to give more from the heart (emotionally) than from the head (intellectually); people generally do not like to do what they ought to do but rather what they want to do. Stress the emotional aspect of what they share when you are making the ask.

An important aspect of solicitation is what comes before the ask. Even if the prospective donor is an old roommate or close friend, an ask is usually most effective when preceded by some cultivation, which varies depending on your existing relationship with the prospect. If you don’t know your classmate very well or not at all, you might begin the cultivation early in the fiscal year by sending a Carleton postcard, providing information about recent campus happenings, or a simple message. Other cultivation ideas include inviting the classmate: to meet you for coffee or a meal, to attend a local Carleton Club event or a campus activity like Convocation or a performance.

**PHONE SOLICITATION**
Before you pick up the phone, make sure you do the following:

- Make your own gift or pledge
- Set some goals and deadlines for yourself (i.e. “I will speak with 2 classmates tonight” or “I will have all of my solicitations made by November 1”, etc.)
- Check the AAF volunteer portal (go.carleton.edu/portal) to get updated information on your assignments. Review their giving history and other information such as their employer, spouse, and children.
- Jog your memory - - take a look at your Zoobook or Algol to put a face to the name.
- Know your facts about Carleton and the AAF. Carleton’s website (www.carleton.edu) is a good source of current information.
- Review the sample calling script on page 26.

Each call is different and there is not a single approach that will work every time. Some volunteers begin calls with the ask and then move on to other topics, while others feel more comfortable breaking the ice and then transitioning to the solicitation. Generally, your calls will include the following aspects:

- **Connect** – Create or re-establish the link you share with your classmate.
- **Chat** – Talk about Carleton today, the Carleton you remember, or other things entirely. Be yourself and be flexible enough to let the conversation develop. By listening to your classmate,
you will pick up cues on how invested they are in Carleton and which direction the conversation should go.

- **Collect** – Although solicitation calls serve to develop relationships and strengthen connections to the College, the main reason you are making the call is to solicit a gift for the Alumni Annual Fund. To do that, use the following talking points:
  - Explain the importance of unrestricted gifts to the College.
  - Relay class dollar and participation goals.
  - Be specific about the dollar amount for which you are asking.
  - Ask for a higher amount than you hope to receive so you will have negotiating room.
  - Be positive about every gift. Participation is very important!
  - Offer giving options such as installment giving, paying by check, or donating stock. Please refer to Giving Options (page 24) in this handbook for specific instructions.

- **Following Up** – to ensure the greatest success, keep the following in mind:
  - You may not reach your classmate the first time. Keep trying! It is up to you whether or not to leave a message, but the ultimate goal is to actually talk to your classmate.
  - Your classmate may need some time to consider a gift to Carleton and may require a follow-up call. Allow a reasonable amount of time to pass before you contact them again but don’t be afraid to make this important second call. Your follow-through will make a difference.
  - Write notes, as appropriate to thank them for taking the time to speak with you and for their commitment to Carleton.
  - Contact your Class Agent or AAF staff manager with gift, pledge, or refusal information. Also notify the AAF of any phone number and/or address changes or important anecdotal information such as a marriage, divorce, or employment change.
  - Your classmate may choose to not give to the AAF this year. However, your positive attitude and endorsement of the College may result in a renewal of their relationship with Carleton in the future.

Above all, have fun and take pride in the fact that your volunteer time is appreciated by current Carleton students and will be valued well into the future!

**EMAIL SOLICITATION**

Email is an increasingly effective and efficient way to communicate with your classmates about the Alumni Annual Fund. It can be used as an introduction to a solicitation call, a thank you for a classmate's time and/or support, a follow-up to a call or letter, or a direct solicitation.

Additionally, the use of Carleton's online giving website (www.give.carleton.edu) has skyrocketed over the last few years and email is a great way to steer your classmates to this easy and convenient way to give. Keep in mind that email communication generally works best when used along with other solicitation methods such as phone calls and direct mail. Some suggestions to get you started:

- Most emails are read within seconds. Try to make an immediate impact.
- The subject line should be attention-grabbing, but not misleading.
- Establish credibility. Use your own name and your own words. State your purpose early in your text and be clear and upfront.
- Making the case for support in an email is more effective when using your personal style.
- If you don't know a classmate, try a thank you or invitation first. If your first email is a solicitation, subsequent email may be ignored.
- Always include the link to Carleton’s online giving page: www.give.carleton.edu
- Include links to other pages on the College website. Fresh news is appreciated.
- Honor a classmate’s request not to be solicited by this method.
There are as many reasons to give to Carleton as there are alumni.

Charles M. Goodsell came to Northfield in 1859 with a dream to found a college, “a new Northwestern Oberlin.” That dream became a permanent reality in 1871 with William Carleton’s timely and seemingly miraculous $50,000 gift to the struggling Northfield College.

Over the years, this College on the edge of the prairie has become a national treasure due to the strong tradition of giving by individuals interested in the long-term well being of the school. The Carleton campus didn’t just appear; it exists in its present form, in actual physical buildings and equipment, in spirit, and in name, because of the support of countless individuals.

This broad-based support continues to be an important part of Carleton today; gifts to the Alumni Annual Fund help sustain the tradition of excellence that distinguishes both the Carleton liberal arts experience and the Carleton student. Your classmates support Carleton each year for a variety of reasons. On the next page are a few ideas to help get you started on making your case for Carleton.
Commitment to the Liberal Arts – Carleton exists to provide a wide-ranging education in the humanities, arts & literature, the natural sciences, and the social sciences for young women and men who will become leaders in their communities, our country, and the world. Annual alumni support helps to provide the academic resources, cutting-edge technology and facilities, and talented and diverse faculty that are essential in accomplishing this mission.

Access – In the words of President Oden, “our obligation is to make a Carleton education available to all who are qualified.” Carleton is one of a handful of institutions in the country that continues to meet the full financial need of all accepted students. That policy is expensive and gets more so each year. In 2006 – 2007, the College spent more than $25 million on scholarships, more than half of which was “unfunded”, meaning that it was not covered by designated gifts or the endowment. The Alumni Annual Fund helps make up the difference between the cost of tuition and what a student can afford to pay.

Real Cost of a Carleton Education – Not a single one of us paid our way at Carleton. Even those who paid the full comprehensive fee paid less than half of the capital and operating costs of their Carleton education. Each of us would have to pay more than $100,000 in today’s dollars to make up the difference between tuition and the real cost of a Carleton education. Annual support from alumni helps provide this “hidden scholarship” to all Carleton students.

Level the Playing Field – “Carleton plays in the big league without big league resources.”- Frank Wright ’50, Treasurer Emeritus. Although Carleton’s endowment is half the size of its peer schools, gifts from the Alumni Annual Fund help Carleton compete financially with wealthier schools. The Alumni Annual Fund is our “living” endowment – nearly $163 million additional endowment dollars would be needed to generate the more than $7.3 million of income provided by alumni, parents, and friends through the Annual Fund last year.

Every Gift Counts – At its essence, the Alumni Annual Fund is a collection of many gifts – last year, more than 13,000 alumni contributed more than $6.26 million to the Alumni Fund. This exceptional level of support would not have been possible without each and every gift. Participation is an important measure of alumni satisfaction and confidence in Carleton. Your gift, no matter the size, shows gratitude for the education you received, and support for the students and faculty who follow you. Only you can account for your participation.

Tradition – There is a rich tradition of alumni support at Carleton that enables the College to offer current students the outstanding learning environment and opportunities from which they benefit. Over the last five years, more than 17,000 alumni (71%) have contributed to the Alumni Annual Fund. Your participation in the Alumni Annual Fund connects you with the thousands of alumni who have helped create and maintain the institution that has given us all so much.

Operating Expenses – The unrestricted support provided by the Alumni Annual Fund each year allows Carleton to maintain its educational excellence by supporting day-to-day operating expenses that are not fully covered by other sources. Unrestricted annual gifts are particularly important because they allow Carleton to place resources where they are immediately needed, providing vital funds that impact every area of the College, especially during periods of increased fiscal pressure and restraints.

Noblesse Oblige – As Larry Gould reminded us in his memorable speech entitled “Noblesse Oblige” (from him to whom much is given much is expected), the privilege of being educated at Carleton includes several responsibilities, one of which is the obligation to support the College. Your education was made possible by the contributions of the thousands of alumni who came before you, and in turn, your contributions help to ensure that Carleton is able to offer the same educational experience to today’s students.

“You are a part of Carleton, and Carleton is a part of you.” – Larry Gould
Responding to Objections

No Money
Your support of the Fund is more than just the amount of your gift.

- Alumni participation demonstrates tremendous confidence in the College and Carleton’s high level of alumni support (56% gave last year) increases Carleton’s ability to secure funds from other sources.
- Carleton’s endowment is smaller than its peer schools. More than $163 million additional endowment dollars would be needed to generate the $7.3 million of income provided last year by the Annual Fund.
- Last year, gifts under $100 totaled more than $174,000. Your individual gift may not seem significant, but it does make a difference.

Business/Economy Is Bad
I understand. However, Carleton faces the same financial pressures as you and I. The College needs to continue providing the best faculty, academic resources, and financial aid to its current students. Your gift, of any amount, to the Alumni Annual Fund helps Carleton provide these important services.

- Gifts to the Alumni Annual Fund are tax-deductible.
- You can pledge now and pay later (before June 30).
- You can pay your gift in installments on your credit card.

Unemployed
I'm sorry to hear that. Did you know that the Career Center is available to help alumni? You may want to contact them at 507-646-4293 or go to the Carleton website. They often make phone appointments with alumni to aid in career moves.

Give Later In The Year
Yes, I understand. Please consider making a pledge now in support of our class gift, which you can pay at any time before June 30. An early pledge will help our class reach its goal faster without last-minute frenzy.

Already Gave This Year
- **Timing issue:** Do you remember when you made that gift? The reason I ask is because it is possible that you gave during the calendar year, but not in the current fiscal year (Carleton’s fiscal year runs from July 1 to June 30). My apologies if we are soliciting you for a second gift. If you wouldn’t mind, I’d be happy to check and get back to you.
- **Fund issue:** Was your gift to the Alumni Annual Fund? The College has several hundred funds and it could be that you gave a gift to a different fund. If you wouldn’t mind, I’d be happy to check on your gift and get back to you.

Support A Restricted Fund
Unlike restricted gifts, contributions to the Annual Fund are used immediately, helping the College to meet its ongoing expenses and to bridge the gap between what a student can afford to pay and the actual cost of a Carleton education. Your support to this vital fund is greatly appreciated!
Support Other Causes
There are many worthy causes out there, and I realize your priorities may be different at this time, but alumni giving is crucial to maintaining the Carleton experience for today’s students. Even if you give to other causes, please consider how unique and important a place Carleton is to you. Your support of Carleton helps other causes by enabling Carleton students to develop the judgment, skills, and vision they need to meet global challenges of the future. Please help future generations make a difference by supporting Carleton today.

Tuition Should Cover Costs/Paid Full Tuition
Full tuition and fees cover less than half of the actual annual cost to educate a Carleton student. The gap between what is paid and the real cost has always been subsidized by the College and annual gifts from alumni, parents, and friends, as well as earnings from endowment gifts. Your support will help bridge the gap between what the student can afford to pay and the actual cost of a Carleton education.

Non-Graduate
Once at Carleton, even for a short time, we all become a member of the Carleton family. You’ve probably heard Larry Gould’s famous phrase, “From this day forward, you are a part of Carleton and Carleton is a part of you.” Many alumni who did not graduate from Carleton support the College every year.

Doesn’t Agree With College Policy Or Decision
It seems a shame to cut off your support for one reason, although an important one, when there are so many great reasons to support Carleton! One of the wonderful things about Carleton is the diversity of ideas and students. I hope you will reconsider.

Child Wasn’t Accepted By The College
I am sorry to hear that your son/daughter was not accepted to Carleton. Some excellent students are not accepted for various reasons. Carleton has experienced a 69% increase in admissions applications in the last 10 years, and a drop of the acceptance rate to 30% in the most recent cycle. By any standard, the application process has grown much more competitive. Where is your son/daughter attending college? Is he/she enjoying it? I hope that you will consider giving to Carleton because of YOUR positive experience.

Stretch Giving (Reunion Classes)
Your gifts have always been generous and most appreciated! During reunion years, we hope our classmates will consider making Carleton a philanthropic priority. The College’s operating costs increase every year, as does inflation. Your increased gift of $___ will help our class meet its ambitious goal and help the College maintain its excellence. You may also split your gift into installments (see page 24 for more information on installment giving).
Give Online
Go to Carleton’s secure giving page at www.give.carleton.edu where you can make a one-time gift or set up installments. American Express, Discover, MasterCard, or Visa are accepted.

Give by Phone
Call the Alumni Annual Fund office at (800) 745-2275 with your credit card information.

Mail a check or money order
Carleton College
Gift Accounting Office
1-CENREC
One North College Street
Northfield, MN 55057-4070

Make a gift by international bank transfer
Contact the Gift Accounting office at giftaccounting@carleton.edu or (800)758-9441 for instructions.

Installment Giving
You can now give to the Alumni Annual Fund on your schedule. Go online or call the AAF to set up monthly, quarterly, or yearly installments for a few months, the entire fiscal year, or indefinitely! This is a great option for donors who would like to schedule a one-time gift for a future date, spread out their gift for the year, or give each year without having to resubmit their payment information.

Gift in Honor/in Memory
A number of classes have encouraged support through gifts made in memory or in honor of special people in their lives. The honored individual(s) do not necessarily need to be affiliated with the College. The honorees’ name(s) are then printed in the College’s fiscal-year-end report on donors, Elements, with the donor’s name directly underneath. This is in addition to the usual listing with the class.

Matching Gifts
Many companies offer employees—even retirees and/or spouses—matching gift programs for charitable contributions. Matching gifts now count towards a donor’s gift club level, and are included in the donor’s class total. Classmates may be more motivated to give, knowing that their gift will be matched—essentially increasing its value.

Companies have various methods by which a matching gift request may be submitted: online forms, automated phone systems, or a paper form that is submitted to Carleton. Donors must contact their employer for specific instructions. To find out if someone works for a matching gift company, go to http://www.matchinggifts.com/carleton.

Leadership Giving
Gift club levels are used as a means of recognizing an individual’s giving, capitalize on competition within the class to persuade donors to increase to the next level, and serve as an example to other classmates. Using this approach varies from class to class and may not work in every situation.
Transfer Stock
Transferring stocks to the College is a way to give without having to make a gift out of pocket and may enable a donor to give more generously than they normally could. For example:

<table>
<thead>
<tr>
<th>Stock Held</th>
<th>Appreciated Stock (original cost of $2,000)</th>
<th>Cash</th>
</tr>
</thead>
<tbody>
<tr>
<td>First</td>
<td>$10,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>Income tax savings (assumes 35% income tax bracket)</td>
<td>$3,500</td>
<td>$3,500</td>
</tr>
<tr>
<td>Capital gains avoidance (assumes 15% capital gains rate)</td>
<td>$1,200</td>
<td>$0</td>
</tr>
<tr>
<td>Net cost of gift to you</td>
<td>$5,300</td>
<td>$6,500</td>
</tr>
</tbody>
</table>

The cash gift would cost this donor $1,200 (or about 23%) more than the stock gift.

The College welcomes gifts of stock. To ensure prompt and accurate processing of stock gifts, notify the College of your intentions by calling our Gift Accounting office at (800) 758-9441 or sending an email to giftaccounting@carleton.edu.

1. Stock held in a brokerage or trust account. Transfer may be made to the College’s brokerage account. Instruct your broker to contact Carleton’s Gift Accounting Office at 1-800-758-9441. To ensure prompt and accurate processing your gift, this should be done each time you initiate a stock transfer as the College’s account numbers are changed periodically.

2. A stock certificate in your possession.
   A. If you are sending a stock certificate that is registered in your name either:
      - Sign and date the certificate on the back in the same form as it is registered, enter the name of Carleton College as assignee and send the certificate by registered mail or Federal Express, or
      - Sign and date a stock power in the same form as it is registered on the certificate, enter the name of Carleton College as assignee. Send your stock certificate and stock power separately by registered mail or Federal Express.
   B. If the certificate has been transferred into Carleton’s name, the stock can be sent directly to Gift Accounting. To ensure that your gift is processed correctly, please include a note with your name and the purpose of the gift.
   C. If the certificate is being sent directly to Carleton from a transfer agent, please ask them to provide your name with the stock certificate.
   D. Please indicate purpose of gift (e.g., Alumni Annual Fund) and mail to:
      Carleton College
      1-CENREC
      Attn: Shannon Schulz
      One North College Street
      Northfield, MN 55057

3. Mutual Funds. Questions regarding transfer of Mutual Funds may be directed to Carleton’s Gift Accounting at 1-800-758-9441.

Please note that as the donor, it is your responsibility to inform the College of your gift of stock. Contact the Gift Accounting Office at 800-758-9441 or 507-646-4196. Faxes may be sent to 507-646-7986. Please include your name, the name of the stock, the number of shares and the purpose of the gift.
Sample Calling Script

Identify Yourself
Hello, may I please speak with ________?
• If “Yes”: Hi, this is___________, your classmate from Carleton College calling on behalf of the Alumni Annual Fund. How are you today/tonight?
• If “No”: Is there a better time for me to call?

Thank You for Past Support
• For classmates that gave to the AAF last year (TOPs, As, and Bs): Thank you for your contribution to the Alumni Annual Fund last year. You were among more than 13,000 alumni who helped us reach 56% participation.
• For classmates that have given in past years (Cs and Ds): Thank you for your past support of the AAF.
• AAF Explanation for classmates that haven’t given to the AAF (Es): The Alumni Annual Fund is an unrestricted fund that supports the immediate needs of current students at Carleton in areas such as financial aid and academic resources.

The Ask
I hope you will make Carleton a priority (again) this year and help our class reach its goal of ___% participation and $_______. Can we count on your support with a gift of $(ask amount)?

Second Ask
If your classmate says “no” to the initial ask, you may want to ask about and discuss their reasons for not contributing (see pages 22-23 for help in responding to objections), and ask again: Alumni support helps make up the difference between the cost of tuition and the actual cost of a Carleton education. Tuition and fees would have to increase by more than $4,000 per student to cover the dollars raised by the Annual Fund. Can we count on your support this year with a gift of $(last gift amount) to help provide the Carleton experience for current and future students?

Participation Ask
If your classmate says “no” again, explain the importance of participation (see pages 9, 20 and 21 for additional information on participation): At its essence, the Alumni Annual Fund is a collection of many gifts – last year, more than 13,000 alumni contributed more than $6.26 million to the Alumni Fund. This exceptional level of support would not have been possible without each and every gift. Participation is an important measure of alumni satisfaction and confidence in Carleton. Can we count on your continued participation this year with a gift of $25?

Gift or Pledge
Thank you! Your participation will make a big difference! Which credit card would you like to use? We take Visa, Mastercard, American Express, and Discover. We encourage gifts on credit cards because they are the quickest and most cost-effective way for the College to process your gift.
• For a gift on a credit card: Can I get your account number and expiration date?
• For a pledge: You can pay your pledge by check or online. We’ll send you an envelope to mail it in or you can go to www.give.carleton.edu. In order for your gift to count for this year, please send it in by June 30.

Thank You
Thank you for your time this evening. As long as I have you on the phone, may I verify your address? Are there any other questions that I can answer about Carleton? Thank you again and have a great evening.
A key factor in the continued success of the Alumni Annual Fund is that it is truly driven by alumni volunteers – not just in name, but in reality. One of the most important tasks you will complete each year is the creation of a fall solicitation letter to send to your class. This is generally the first and most in-depth appeal your classmates will receive. Starting on page 36, you will see samples of letters written by volunteers across the decades. Though the letters are as varied as the individuals themselves, there are some things they have in common. Listed below are suggested elements to include and general letter-writing tips to help you get started on your letter writing this year.

**ELEMENTS**
- Make the case for giving to the Alumni Annual Fund. Why do you give? See the Case for Carleton on page 20.
- Evoke memories of campus, college life and classmates through Carleton images and experiences.
- Include current Carleton news or items of interest. Many volunteers find that attending the workshop provides inspiration for writing, including quotes from the president, updates, and alumni connections. Others draw on their own recent personal, club, or travel experiences. The Carleton web site is a great resource.
- Incorporate items that elicit pride in the institution, such as meeting the financial aid need of all admitted students, or our #1 ranking in alumni giving participation in *U.S. News and World Report*.
- Give last year’s class results, as well as goals for this year.
- Thank those who gave last year and/or for considering a gift this year.
- Include individual ask amounts to give classmates a specific level to consider and/or “soften” the follow up call.
- Refer to the ways to give to the AAF, including the online giving link: [www.give.carleton.edu](http://www.give.carleton.edu). Encourage setting up automatic installment payments.

**GENERAL TIPS**
- Just Do It! Like those college papers, it only gets more difficult if you procrastinate.
- Let your own personal style come through. Using humor or a light-hearted approach can be effective in making the case for support (and keep your classmates reading) if it comes naturally to you.
- Begin with a catchy first paragraph to make it clear this is not a canned solicitation appeal.
- Keep the letter to one page, if possible.

Don’t hesitate to ask your AAF staff contact for help, whether it be for information, tips, specific types of letters samples, or feedback.
The Carleton Reunion Experience
RETURN, RENEW, REUNION.
As you will see from the reunion records on page 32, Carleton’s reunion effort has yielded terrific results. Over the past nine years, reunion classes have increased giving from just over $1 million to more than $2.2 million, and participation from 48% to 58%. Attendance at reunion has skyrocketed from approximately 1,500 people attending to more than 2,500!

For these and many other reasons, Carleton has been included in U.S. News & World Report’s “Best Colleges” list many times. The College is regularly ranked high among its peers in the publication’s categories such as selectivity, graduation rate, student satisfaction, academic reputation, and, significantly, alumni support. Alumni give back to Carleton in record numbers when asked, and often even without being asked. In supporting the College, alumni demonstrate a belief in the importance of helping an outstanding faculty reach the brightest students in a demanding and supportive learning community.

REUNION GIVING
The Alumni Annual Fund has long aimed to help Carleton maintain its high standards of excellence in and out of the classroom (e.g., quality instruction, facilities, and financial aid) by contributing to its operating budget. Today, nearly 7% of Carleton’s budget is contingent on the work of volunteers like yourself and the AAF.

Every year, every gift helps, but reunion years are special. Not only do reunions provide the opportunity to reconnect with Carleton and classmates, they are also a good time for alumni to celebrate what the College has meant to them with a larger contribution. Alumni are urged to make a S-T-R-E-T-C-H gift, increasing their level of giving by 3, 4, or 10 times. They can then return to a level at which they are comfortable after reunion. Since the reunion giving program was implemented in 1996, reunion giving has jumped from $1 to more than $2.2 million. It is through S-T-R-E-T-C-H giving that reunion classes ensure that Carleton has the support it needs. This should be an integral part of your goal setting strategy.

REUNION COMMITTEE
Reunion committees are usually comprised of a gift committee and a program committee. The basic role of each committee is described below. See page 33 for more details about the responsibilities of gift committee members.

Gift Committee Roles
- Set reunion gift and participation goals and develop strategies to achieve them
- Make your pledge during Reunion Planning Workshop
- Educate and promote the importance of annual giving and participation in your reunion class gift through personal visits, phone calls, letters, or email
- Solicit a stretch reunion gift from classmates and encourage pledging in the fall
- Choose 3-9 classmates to solicit
- Encourage classmates to attend reunion!
Program Committee Roles

• Develop personal contact plan for class and set attendance goal
• Write inspirational class letters
• Plan class-specific program items for the reunion schedule
• Create a class web page
• Design a questionnaire for the bio book
• Host informal class social time
• Encourage classmates to attend reunion!

THE BASICS
Your committee will focus on three aspects of reunion during the planning process. At the Reunion Planning Workshop you will set goals for **GIVING** (the dollars contributed by your class), **PARTICIPATION** (the number of classmates who give to the AAF), and **ATTENDANCE** (the number of classmates who attend reunion).

**Giving**
The gift drive provides a powerful impetus for increased financial support, while also strengthening individual and class ties with the College by renewing shared class feelings of pride and loyalty. Typically, reunion class giving at Carleton comprises approximately 30% of Alumni Annual Fund dollars, a significant portion of the $6.267 million raised last year. The role you and your committee will play is vital to our success!

**Participation**
Carleton is judged by many standards. National publications, such as *U.S. News & World Report*, as well as corporations and foundations, consider alumni participation rates an important indicator of loyalty and satisfaction with the College and a vote of confidence in the institution. A gift to the Annual Fund – and your class gift – is the equivalent of shouting from the rooftops “Carleton College’s mission is worth supporting!” See pages 9, 21, and 22 for more information on the importance of participation.

**Attendance**
High levels of attendance at Reunion contribute to a more memorable and exciting experience, lead to higher levels of attendance at future reunions, and strengthen the tie between the College and alumni.
### Reunion Giving Dollar Records

<table>
<thead>
<tr>
<th>Reunion</th>
<th>Class</th>
<th>Giving Total</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>5th</td>
<td>2000</td>
<td>$32,670</td>
<td>2005</td>
</tr>
<tr>
<td>10th</td>
<td>1991</td>
<td>$101,295</td>
<td>2001</td>
</tr>
<tr>
<td>15th</td>
<td>1991</td>
<td>$219,702</td>
<td>2006</td>
</tr>
<tr>
<td>20th</td>
<td>1986</td>
<td>$181,875</td>
<td>2006</td>
</tr>
<tr>
<td>25th</td>
<td>1962</td>
<td>$1,428,635(^a)</td>
<td>1987</td>
</tr>
<tr>
<td>30th</td>
<td>1976</td>
<td>$396,978</td>
<td>2006</td>
</tr>
<tr>
<td>35th</td>
<td>1962</td>
<td>$529,249</td>
<td>1997</td>
</tr>
<tr>
<td>40th</td>
<td>1962</td>
<td>$766,292</td>
<td>2002</td>
</tr>
<tr>
<td>45th</td>
<td>1962</td>
<td>$804,617</td>
<td>2007</td>
</tr>
<tr>
<td>50th</td>
<td>1952</td>
<td>$262,657(^b)</td>
<td>2002</td>
</tr>
<tr>
<td>55th</td>
<td>1952</td>
<td>$190,939</td>
<td>2007</td>
</tr>
<tr>
<td>60th</td>
<td>1936</td>
<td>$94,766</td>
<td>1996</td>
</tr>
<tr>
<td>65th</td>
<td>1935</td>
<td>$73,084</td>
<td>2000</td>
</tr>
</tbody>
</table>

\(^a\) Originally unrestricted. Eventually designated $78,880 to Alumni Annual Fund; $1,349,755 to restricted Reunion Fund.

\(^b\) For their 50th Reunion Gift, a restricted fund, the Class of 1952 raised $28 million.

### Reunion Giving Participation Records*

<table>
<thead>
<tr>
<th>Reunion</th>
<th>Class</th>
<th>Participation</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>5th</td>
<td>1997</td>
<td>67%</td>
<td>2002</td>
</tr>
<tr>
<td>10th</td>
<td>1994</td>
<td>69%</td>
<td>2004</td>
</tr>
<tr>
<td>15th</td>
<td>1991</td>
<td>64%</td>
<td>2006</td>
</tr>
<tr>
<td>20th</td>
<td>1985</td>
<td>61%</td>
<td>2005</td>
</tr>
<tr>
<td>25th</td>
<td>1962</td>
<td>86%</td>
<td>1987</td>
</tr>
<tr>
<td>30th</td>
<td>1973</td>
<td>63%</td>
<td>2003</td>
</tr>
<tr>
<td>35th</td>
<td>1972</td>
<td>72%</td>
<td>2007</td>
</tr>
<tr>
<td>40th</td>
<td>1964</td>
<td>82%</td>
<td>2004</td>
</tr>
<tr>
<td>45th</td>
<td>1961</td>
<td>78%</td>
<td>2006</td>
</tr>
<tr>
<td>50th</td>
<td>1954</td>
<td>77%</td>
<td>2004</td>
</tr>
<tr>
<td>55th</td>
<td>1941</td>
<td>70%</td>
<td>1996</td>
</tr>
<tr>
<td>60th</td>
<td>1941</td>
<td>63%</td>
<td>2001</td>
</tr>
<tr>
<td>65th</td>
<td>1941</td>
<td>53%</td>
<td>2006</td>
</tr>
</tbody>
</table>

*Based on the number of actual donors in a class divided by the number of solicitable alumni in the class.

### Reunion Attendance Records

<table>
<thead>
<tr>
<th>Reunion</th>
<th>Class</th>
<th>Year</th>
<th>Record Set</th>
<th>Percent Attending</th>
<th>Number Attending</th>
<th>Class Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>5th</td>
<td>2002</td>
<td>2007</td>
<td>48.00%</td>
<td>254</td>
<td>524</td>
<td>524</td>
</tr>
<tr>
<td>10th</td>
<td>1989</td>
<td>1999</td>
<td>43.50%</td>
<td>214</td>
<td>492</td>
<td>492</td>
</tr>
<tr>
<td>15th</td>
<td>1987</td>
<td>2002</td>
<td>26.68%</td>
<td>131</td>
<td>491</td>
<td>491</td>
</tr>
<tr>
<td>20th</td>
<td>1987</td>
<td>2007</td>
<td>31.00%</td>
<td>153</td>
<td>497</td>
<td>497</td>
</tr>
<tr>
<td>30th</td>
<td>1973</td>
<td>2003</td>
<td>20.11%</td>
<td>75</td>
<td>368</td>
<td>368</td>
</tr>
<tr>
<td>35th</td>
<td>1961</td>
<td>1996</td>
<td>33.50%</td>
<td>77</td>
<td>230</td>
<td>230</td>
</tr>
<tr>
<td>40th</td>
<td>1954</td>
<td>1994</td>
<td>34.20%</td>
<td>79</td>
<td>231</td>
<td>231</td>
</tr>
<tr>
<td>45th</td>
<td>1961</td>
<td>2006</td>
<td>38.53%</td>
<td>84</td>
<td>218</td>
<td>218</td>
</tr>
<tr>
<td>50th</td>
<td>1954</td>
<td>2004</td>
<td>48.66%</td>
<td>109</td>
<td>224</td>
<td>224</td>
</tr>
<tr>
<td>55th</td>
<td>1950</td>
<td>2005</td>
<td>24.54%</td>
<td>66</td>
<td>269</td>
<td>269</td>
</tr>
<tr>
<td>60th</td>
<td>1941</td>
<td>2001</td>
<td>25.55%</td>
<td>35</td>
<td>137</td>
<td>137</td>
</tr>
<tr>
<td>65th</td>
<td>1932</td>
<td>1997</td>
<td>15.79%</td>
<td>12</td>
<td>76</td>
<td>76</td>
</tr>
</tbody>
</table>
As a class nears its reunion, Alumni Annual Fund staff and Board members work with class agents to recruit and organize a class Reunion Committee. This committee is comprised of class members interested in both fundraising and program activities. Generally, the class agents or the gift committee chairs will recruit gift committee members from the class.

Gift committee members are often, but not limited to, those class members who have served as assistant agents during non-reunion years. Because the dollar and participation goals in a reunion year are significantly higher than in other years, gift committee and program committee chairs depend on a large group of committee members to insure a successful class reunion.

**Gift Committee Member responsibilities include:**
- Making an early financial commitment to the Alumni Annual Fund.
- Assisting the class agents by contacting classmates and soliciting their financial support.
- Offering input and suggestions to help craft the solicitation strategy throughout the year.
- Updating the class agents and the AAF staff on the progress of their solicitations. This also includes passing along any biographical information that may be of interest to the College such as changes in address, employment, or marital status; the birth of children; and advanced degrees earned.
- Putting an added emphasis on soliciting S-T-R-E-T-C-H gifts in honor of reunion.
- Attending the Reunion Planning Workshop in August.
Reunion Time Line

Please use the timeline below as a tool to help plan your committee tasks and communication to the class throughout the year. It includes solicitation deadlines, the College-directed mailing calendar and recommended conference call schedules.

<table>
<thead>
<tr>
<th>Gift (Alumni Annual Fund)</th>
<th>Reunion (Alumni Affairs Office)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Solicitation Letter draft due at Workshop</td>
<td>August &amp; September</td>
</tr>
<tr>
<td>Class Solicitation Letter mailed</td>
<td>First Reunion Letter with directory and bio surveys mailed</td>
</tr>
<tr>
<td>Volunteers make own AAF commitment</td>
<td>Set up committee listserv as desired</td>
</tr>
<tr>
<td>Elements: Report on Giving mailed with pledge envelope to all alumni</td>
<td>October</td>
</tr>
<tr>
<td>Conference call: TOPs solicitation</td>
<td>Bio Book reminder sent</td>
</tr>
<tr>
<td>Solicitation of TOPs completed by Oct. 1</td>
<td></td>
</tr>
<tr>
<td>Opening Doors mailed to non-donors</td>
<td>November</td>
</tr>
<tr>
<td>Solicitation of Volunteers completed by Nov. 1</td>
<td>Completed Bio Book questionnaires due</td>
</tr>
<tr>
<td>Check the AAF volunteer portal for updates</td>
<td>Conference call: finalize program ideas</td>
</tr>
<tr>
<td>Calendar Year End Solicitation sent to non-donors</td>
<td>December</td>
</tr>
<tr>
<td>Solicitation of assigned classmates, Groups A—E completed by Dec. 31</td>
<td>Second Reunion Letter with bio books mailed</td>
</tr>
<tr>
<td>Conference call:</td>
<td>Class web page live</td>
</tr>
<tr>
<td>“Volunteer for Carleton” student stewardship event</td>
<td>January</td>
</tr>
<tr>
<td>Check the AAF volunteer portal for updates</td>
<td>Attendance outreach emails/calls begin</td>
</tr>
<tr>
<td>Opening Doors mailed to non-donors</td>
<td>February</td>
</tr>
<tr>
<td>Conference call: Mar. 15 cut-off and participation</td>
<td>Outreach continues</td>
</tr>
<tr>
<td>Complete all solicitations to meet March 15 cut-off for Preliminary Donor Letter</td>
<td>Conference call: attendance push</td>
</tr>
<tr>
<td>Preliminary Donor Letter mailed to all alumni</td>
<td>March</td>
</tr>
<tr>
<td>Check the AAF volunteer portal for updates</td>
<td>Registration materials mailed</td>
</tr>
<tr>
<td>Check the AAF volunteer portal for updates</td>
<td>Online registration opens</td>
</tr>
<tr>
<td></td>
<td>Email to announce online registration</td>
</tr>
<tr>
<td>Opening Doors to non-donors and non-pledgers</td>
<td>April</td>
</tr>
<tr>
<td>Targeted email &amp; letter solicitations</td>
<td>Third Reunion Letter mailed</td>
</tr>
<tr>
<td>Conference call: reunion push</td>
<td>Online attendance lists go live</td>
</tr>
<tr>
<td>Pledge Reminder with Opening Doors insert mailed to all pledgers on June 1</td>
<td>May</td>
</tr>
<tr>
<td>Targeted email solicitations by class and College</td>
<td>Postcard to Twin Cities alumni mailed</td>
</tr>
<tr>
<td>Conference call (post-reunion): June 30 deadline</td>
<td>Early-bird registration deadline</td>
</tr>
<tr>
<td></td>
<td><em>Committee members: please register by May 1</em></td>
</tr>
<tr>
<td></td>
<td>June</td>
</tr>
<tr>
<td></td>
<td>Final registration deadline June 1</td>
</tr>
</tbody>
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Reunion June 19 - 22, 2008
Letter and Email Samples
Class Agent Letter Samples
“Something happens here at Carleton that doesn’t happen at other schools and that needs to be supported. It’s every alumnus’s responsibility”

A Carleton trustee, Cathy Paglia ’74 (page 56 in the summer 2006 Voice) describes student faculty relationships. This is the attitude we experienced when we arrived on campus in 1941. To discover that it still exists is gratifying.

It is right for us to respond to these words. If you think you no longer can make a difference in preserving Carleton’s mission, consider this: we can make a huge difference in the lives of students and faculty by making a gift to the Alumni Annual Fund. Your direct support provides funds for financial aid and many campus needs. You help not only to keep Carleton’s doors open but to assure excellence.

Do you assume, since you have no large sums at your disposal, you can’t make a difference? Remember this – a modest gift of any amount is participation. Participation can be $1.00. Multiple small gifts add up and collectively we can make a big difference. Our support sends a strong message to the philanthropic agencies who do give large sums to colleges. If you have yet to start this habit of giving, start this year and help increase our participation. It does count.

If you are among the 45% of us who made a gift last year, congratulations – you’re doing your part. We make our gifts for various reasons: to express hope for the future; to help our tax rate; to give back for the help we received as students, and many other personal reasons. This year, for whatever reason, donate to the AAF.

There are three ways to give. Use the enclosed envelope or call the AAF directly at 800-745-2275 or donate online at https://webapps.carleton.edu/alumni/gift.

Have a wonderful year – let us hear from you.

Mary “Reig” Coyte                     Betsy Bierman

Mary “Reig” Coyte                    Betsy Bierman

1945 Co-Class Agents
Three people on a cruise were lost at sea and eventually washed up on an island. The first, President of his local bank, began busily digging in the sand, writing HELP in large letters. The second, a construction engineer, began tearing down bushes and tree branches to build a huge bonfire to attract attention.

The third, a Carleton graduate, sat idly by and watched the others hard at work. She seemed completely unconcerned. When queried by her friends as to why she was not at all worried, she replied, “I went to Carleton College and the Alumni Annual Fund always knows where to find me.”

We don’t believe that the members of the Class of ’55 will be so foolish as to end up ship-wrecked on an island, but regardless of where you may be, we feel confident that you will think of the Alumni Annual Fund before they come looking for you. Please take a minute and make your annual support of the College right now in one of three ways:

--Make a pledge and give on-line at [www.give.carleton.edu](http://www.give.carleton.edu) and follow the prompts.

--Call the AAF office at 800-745-2275 and tell them your intentions, credit card in hand.

--Use the enclosed pledge envelope and a good old-fashioned postage stamp.

Whichever way you select, please know that we and the College are grateful. Just like Public Broadcasting, Carleton would not exist without support from friends like you.

Thank you.

Bill Buffett     Nancy Furby Hamlin     Pat Schipplock Oetting
Dot Sundquist Soudakoff     Margie Keiter Wales
October 2006

Dear First Name,

What happened to the past year? We probably were not as busy as we were our freshman year, but the time seems to go by faster. Again it’s time to drop a note to each and everyone about the Alumni Annual Fund drive which will start as you read this letter and end June 30, 2007 after several reminders.

One thing that I discovered this week is that our class has given about $1,000,000 to the College since the year 2000 drive! Pat yourselves on back because you deserve it. A little effort each year pays off over time – some colleges are lucky to get that much from their entire alumni in a year.

This year your class Annual Fund committee has set goals of raising $140,000 and achieving a 66% participation rate. I hate to recite figures, but I think it is important for you to know how well we do. Last year the class donated about $138,000 from 56% of the class.

I should point out that the gift you give now and each year since our 45th reunion accumulates towards the class gift at our 50th reunion. So as you think about your giving plan for Carleton remember that your gift will be recognized now and in the 50th reunion.

The entering freshman class, Class of 2010, stands at 507 students and represent 45 states and 21 countries. About half of the class is receiving $4.9 million in Carleton grants. This is one area where your unrestricted giving supports the College.

Once again, thank you for whatever support you have given the Annual Fund in the past and please consider a gift this year. You may do so online at www.give.carleton.edu, by mailing a check to the Alumni Annual Fund, or calling them at 800-745-2275.

Yours truly,

Rene Fournier
1960 Class Agent
September 2006

Dear First Name,

We are writing to you to kick off this year's Alumni Annual Fund (AAF) campaign. We also are pleased to report our results for last year's AAF efforts.

Last year, our class gave a whopping $100,333 - far surpassing our goal of $90,000. However, we fell short of our participation goal, with exactly 50% of you making gifts. This shortfall puts us well below the Carleton average of 54% and also down from last year's disappointing 52%. Embarrassingly, this was our class' worst participation performance this century.

For your convenience, we have reviewed the record, and provide the following report card. Your performance from last year is reflected below:

☑ A. You are among the 50% who generously met their Carleton stewardship responsibilities last year. We thank you. You have attained Honor Roll status.

Here is your gold star ➔

☐ Incomplete. You have not satisfied your Carleton stewardship responsibilities. Now is the time to fulfill your obligation and join the esteemed Honor Roll.

☐ F. You have consistently failed to meet your Carleton stewardship responsibilities. Your behavior is not reflective of the high charitable standards for which Carleton alumni are renowned.
Grade Implications

A. Your pattern of generosity is admirable. Please help us attain our AAF goal of $110,000 by giving again this year. In doing so, you will maintain your Honor Roll status and your dignity.

Incomplete. Your grade is not final yet. There is still time to redeem yourself. Send in your gift or pledge now. Help us to wipe away the embarrassment of falling below Carleton’s high AAF participation average. Our goal this year is to meet the 56% level.

F. Perhaps you are unaware that Carleton ranks #1 in the nation in alumni satisfaction with their college. This is based on the level of alumni participation in annual fund giving. U.S. News and World Report has honored Carleton with this ranking for 5 consecutive years. You should not consider yourself worthy of this elite ranking. You are a failure and a sloth. The shame is yours.

What to Do:
• Send in your gift today.
• Join your classmates on the Honor Roll.
• Get a gold star for your refrigerator door.
• Get the AAF police wiretaps removed from your home.
• Feel the warm glow of knowing that you fulfilled your stewardship responsibilities.
• Accept our many thanks for your important participation.

Short of time? It is easy and fast to go on-line. You can even schedule your payment in advance. Imagine, you can earn your gold star in perpetuity. Go to www.give.carleton.edu, and you’ll get the priceless reward of our solicitations ceasing for one year. Or, call 800-745-2275 -- friendly AAF staff members have a Gold Star waiting for you!

Harold Dennis

Frank Peregrine
Dear First Name,

First we must solicit your strictest confidence in this transaction\(^1\). You have been recommended by an associate\(^2\) who has assured me in confidence of your ability and reliability to prosecute a transaction of great magnitude involving a pending business transaction requiring maximum confidence.

We are official representatives of the State Actuary Governmental Authority (SAGA\(^3\)) of the government of Goodhuevia\(^4\). We wish to import goods into your country, but at presently our source of funding has been trapped and detained at the express orders of Gen. Leighton Evans\(^5\) himself. It is our most express desire to transfer these funds from our bank account in Goodhuevia to your bank account, the latter being a total of $21 million U.S. Dollars (US$) of which portion we will give you 10%\(^6\) for your confidence and reliability in processing this transaction.

Please be ensured that this transfer will be 100% safe\(^7\) to you at all times, as the proceeds come from steam tunnel revenues which were grossly over-billed and then doubly collected at all times, the latter portion being spilled. To collect this money transferable, we need the necessary license-fee funds from you to release the fundings, please following the follow steps:

1. Go to www. Carleton.edu expressly;
2. Poke around a bit, and then click on the link that says “Giving to Carleton”;
3. Follow the simple, on-screen instructions\(^8\).

Once you have made your most generously transfer of funds, the $21 million U.S. Dollars (US$) will be wired into your account most expressly, the complete picture of the account being sent to you once you have made contact.

Remember, this is a Deal so treat with the utmost confidentiality.

Most Sincerely\(^9\)
Yours,

Dave Hoppe       Deirdre Weaver                                   Alan Saliin
Class Agent       Class Agent                                         Class Agent

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1. This is a scam. Trust us.
2. Who shall remain nameless. We never give up our sources.
3. As Homer Simpson would say, “Mmmmm…..Saga…….”
4. This is only a scam. There is no “Goodhuevia”. At least not yet.
5. You will know him by his bald spot.
6. 10% of $21 mil!?!? I’m no math major, but I could use 13 million bucks! Count me in!
7. Safe. And effective!
8. Of course you can also use the enclosed envelope, but, either way, Goodhuevia only sends money back if you give until it hurts.
9. Actually, insincerely. The truth is this is only a fund-raising scam disguised as, well, a fund-raising scam. But please give anyhow. It’s a swell college, and they do swell things with the money. Trust us.
Dear First Name,

Our 15th reunion has come and gone! One hundred and fourteen of our classmates arrived on campus this past June to reconnect with old friends, make new friends, and experience another wonderful Carleton Reunion Weekend.

For that, we are grateful to Suzanne Rose as well as to our retiring class agents, Frances Spangler and Christopher Payne. They, along with the reunion committee and the Alumni Annual Fund class volunteers, pulled together a terrific weekend and a remarkable gift to the college. Just as the class of 1991 has done for each of the last two reunions, we gave a gift that doubled the previous 15th reunion giving record. And, just as our class has done twice before, we also set a new 15th reunion participation record. With 64% of the class contributing, we gave a gift of over $219,000 to the AAF! Enormous thanks to everyone who played a part in, once again, breaking old records and setting new standards for alumni giving.

In other news, Carleton has been making its way onto a number of different “best” lists recently. For the fourth year running, the College ranked #1 in the percentage of alumni who donate to their school, which helped assure a spot among the top 10 liberal arts colleges in the nation as evaluated by US News and World Report.

The Chronicle of Higher Education took time to note that women comprise nearly half of Carleton’s science and math majors, and that Carleton is one of the country’s top 20 producers of women graduates who go on to earn doctorates in the physical sciences. Washington Monthly placed Carleton 12th out of the 202 liberal arts colleges it evaluated on criteria that included measures of how successful the school is at attracting and educating lower-income students, the school’s ability to foster research, and how well it promotes an ethic of community service. The Advocate College Guide for LGBT Students recognized Carleton as one of the country’s top campuses, with its positive living and learning environment for LGBT students.

As you know, the AAF makes a big difference in Carleton’s ability to meet the financial needs of all students. For this reason, we hope you will make a donation this year. We ask that you consider a gift of $xxx, although a gift of any size is both appreciated and truly helpful. You can give online at www.give.carleton.edu, by calling 800-745-2275, or with the enclosed envelope.

We would also like to take this opportunity to request your non-monetary assistance. If you are interested in helping the AAF on behalf of the Class of 1991, please email one of us, or contact Stefanie Morrison (smorriso@acs.carleton.edu) from the Alumni Annual Fund. It’s a very modest time commitment, but it has a huge positive impact on students’ lives.

Please help keep Carleton on everyone’s “best” lists!

Thank you,

Michael Eichner  Lisa Legrand  Melissa Nelson
meichx@yahoo.com  legra002@umn.edu  nelson440@aol.com
It’s a new fiscal year...

What Kind of Giver are You?

1. Your co-worker forgets his lunch. You:
   a. give him half of yours.
   b. sell him yours.
   c. ask why he’s buying into the social construct of lunchtime.

2. You pass someone stranded with a flat tire. You:
   a. pull over and work together as a team to fix it.
   b. offer to let him use your cell phone and charge him for the minutes.
   c. can’t stop because you are driving alone in the carpool lane.

3. You are on a first date and the check arrives. You:
   a. offer to split it, obviously.
   b. call dinner a “business meeting” and put it on the company card.
   c. eat the check and sneak out the back door in protest of The Man.

4. It’s your grandma’s birthday. You:
   a. coordinate a joint gift from all 12 grandkids.
   b. pimp grandma’s ride so when you inherit it, it will be worth more $$.  
   c. do nothing. Birthdays are a Hallmark conspiracy.

Mostly A’s:

Socialist giver
You believe in the power of grassroots giving. Everyone’s contribution works for the common good. Go to give.carleton.edu to set up installment gifts, then find out if your employer has a matching gifts program.

Mostly B’s:

Capitalist giver
For you, Carleton is an investment. Give now at give.carleton.edu before inflation devalues the buying power of your dollars any further.

Mostly C’s:

Anarchist giver
You may not believe in establishment, but you do believe in the spirit of Carleton. You should:
1. Make a gift online at give.carleton.edu.
2. Draw flag on enclosed envelope.
3. Burn envelope.

No matter what type of giver you are, your gift keeps Carleton #1 in alumni giving. Your 2004 class volunteers want to thank you for your continued support, and hope we can count on you for a gift of $ (ask amount) this year. Thanks!

Your Class of 2004 AAF Volunteers

Danielle Bart · Britta Blodgett · Kathryn Brooks · Maggie Goodspeed · Tessa Hersh · Elliot James
Katie Jumbe · Art Kavalis · Jamie Long · Trevor McNeil · Jessica Moore · Annie Olinick
Angie Salisbury · Christina Spencer · Sarah Tilman · Robin Weber · Julie Woulfe

*If you feel that your giving style or political views were misrepresented in this quiz, please visit give.carleton.edu so that your gift can help to better educate future Carls.
Reunion Letter Samples
Dear Classmates!

Our 60th Carleton Reunion approaches in June 2007 and I am hoping that many of you will be planning to come. We probably will be housed in a nearby motel, shuttled back and forth to campus, and have individual bathrooms, how about that? Reunions are enthusiastically attended, parking is tight, and housing is getting short as so many Alumni return. Some of the meals are served buffet style in huge white tents. Be assured, however, that Carleton provides good care for those of us who are MATURE and may need a bit of coddling as well as sure footing.

While I was on campus August 18-20 for the annual Stewardship meetings, I found a copy of a current Overview Book for prospective students and found the above quote by Larry Gould. I hope it brings a smile, perhaps even a tear, as well as lots of memories to share. The campus looks beautiful and tidy, reunion activities are fun, and presentations will make you wish you lived in Northfield and could audit classes and attend convos. Carleton’s wonderful sense of humor continues and you will be pleased by the civility and sense of caring for the needs of others world-wide.

Now on to business. Perhaps you remember that at our 50th reunion in 1997, our Class established the Laurence McKinley Memorial Scholarship Fund, which provides on-going financial aid for current students. Each year I receive a personal note for the current recipient. What a warm feeling it is to know we are making it possible for students with need to attend Carleton, just as each of us was assisted by a “hidden scholarship” many years ago, provided by Alumni donations. This reunion, however, we are not being asked to make a contribution of that magnitude but instead to give a generous contribution to the current Alumni Annual Fund. We were able to donate a little over $30,000 in 2005-6 with 48 percent of our Class contribution. THANK YOU SO MUCH FOR YOUR HELP! I AM NOW ASKING YOU TO DOUBLE THIS AMOUNT BY JUNE 30, 2007 AND THAT AT LEAST 60 PERCENT OF THE MEMBERS OF THE CLASS OF 1947 MAKE A GIFT. The Annual Fund is a collection of many gifts. Your donation, no matter the size, shows the gratitude for the education you received. Participation is an important measure of Alumni satisfaction. This unrestricted support allows Carleton to maintain its educational excellence. Remember that Carleton plays in the Big Leagues, without Big League Resources according to Frank Wright, Class of ’50, who is now Treasurer Emeritus. Although Carleton’s endowment is only half of its peer schools, our gifts to the Alumni Annual Fund help us compete financially with our wealthier competitors.

It is nearly 10 months from September til June 2007. A gift of $100 is only $10 a month. Double that equals $20 a month. Those of you who have been on “vacation” in the past, please be especially generous this year. WE NEED EACH OF YOU. I like to make my pledge by credit card. Call 1-800-745-2275 and work out a giving plan with the friendly Alumni Annual Fund staff—timing and amount. It can be monthly, on a date you choose, or in one chunk. Checks and money orders are equally welcome. Try checking on your gift with your employer’s plan for non-profit donations. And if you give before December 31st, it is tax deductible in 2006. It saves Carleton postage, paper, and multiple mailings. SAVE A TREE. Or, go on line to www.give.carleton.edu to make a one time donation or set up installment payments. It is a secure giving page.

With warm wishes for a happy holiday season. I would enjoy a note from you. You can contact me at 1900 Lakeview Court SW, Rochester, MN 55902-4203 or putzinger@aol.com. See you in June.

Thank you,

Pauline Utzinger
Your appreciative class agent.
Dear First Name,

With our 55th reunion coming up, our thoughts should include making a great contribution to the Alumni Annual Fund this 2006 – 2007 campaign year. Although the past two years we’ve fallen short of our money goals, I’m optimistic that we can meet our goal of $100,000 and hope you’ll increase your gift in honor of our celebration. The Class of ’52 has a “can-do” reputation and I’m thus hoping we’ll live up to that reputation – and then some – now.

If you gave last year, again, please consider increasing the amount of your gift this year. If you’ve not been giving, please add yourself to the list of donors.

Though I wasn’t pleased at missing our money goal in 2005 – 2006, I was very happy that we achieved 63% participation. Now I’d like to see us achieve an even higher percentage this year. We can do it!

I hope to see you in June. Name tags the size of car license plates would no doubt be most helpful at this stage of our lives. (Remember when the year 1984 was beyond our wildest imagination? Here we are over twenty years past that! So it goes. I was recently talking to a young woman about to turn twenty-one. She was so excited, just couldn’t wait for that big birthday. I carefully refrained from saying that, once there, she’d begin to find out how fast time could fly!)

Please be sure to give to the Alumni Annual Fund. Today’s students whom our donations help are the people whose education, expertise and leadership the world will desperately need if it’s to survive.

Also, if you give early you won’t have to say, “Oh, no, not another letter from HER (me)!” when you collect your mail.

Sincerely,

Mary Ann Johnson, ’52 Class Agent
Dear Classmates,

This is going to be a confusing year. Reunions are like that. We, like Nixon, will try to make everything perfectly clear.

First there is the matter of location. In last year’s letter we talked quite a bit about Dundas. That may have confused some of you. Our 50th Reunion is actually in Northfield, not Dundas. It is very important that you be at Reunion. Everything else is less important.

Next is the matter of gifts to the College. There is the 50th Reunion Gift and there is the Alumni Annual Fund gift. Once you understand how they differ, we hope you will make two gifts to Carleton this year. But, as indicated above, if you are not in a position to give at this time we still want to see you at Reunion. That is the most important thing.

You have received mailings from the 50th Reunion Committee about the 50th Reunion Gift. This is a once in a lifetime gift and can be in cash, a provision in your Will or Trust, or the inclusion of Carleton as a beneficiary on your IRA. There are probably other ways to contribute as well. The key point here is that this Gift becomes a permanent legacy of the Class of 1957 and will be used for the purposes designated by the Class (in the case of unrestricted gifts) or by individuals within the Class (in the case of restricted gifts). Yes, you can specify how you wish your gift to be used. It may be helpful to think of the 50th Reunion Gift as intended to promote the long-term financial health and vitality of Carleton.

The Alumni Annual Fund gift, on the other hand, supports the current fiscal year budget. It is used to provide financial aid to students, underwrite staff salaries, and meet other priority needs as determined by the administration and Board of Trustees. Last year’s AAF gifts totaled $5.9 million from approximately 12,700 Alumni. That level of support helps to make Carleton the remarkable place that it is.

Last year our class gave $74,438 from 129 people or 55% of the class. Over the past 5 years we have given an amazing $400,270. Thank you! This $400,270 plus all of our gifts given through this year’s Alumni Annual Fund will be included in the total announced at our 50th Reunion Convocation. Wouldn’t it be great to reach the half-million-dollar mark? Gwen and I increased our giving this year. We hope many of you will also. If you didn’t give last year, we hope you will this year.

As an incentive to increase our participation in both gifts, the AAF and the 50th Reunion, consider these amazing statistics -- the Class of 1964 had an AAF participation rate of 84.5% last year. In June, the Class of 1956 set a new record for 50th Reunion Gift participation at 83%. If everyone in our class who has at some time given a gift to Carleton were to give again this year, our participation rate would be 90.7%. It is our 50th Reunion year. How about putting the Class of ‘57 up with the leaders? We may not be able to compete with some other classes on size of gift but we have an equal chance in participation rate. Here is where each gift--of either category and of whatever size—is equally important. No one can carry the load for anyone else.

For convenience, you can make your AAF contribution online using your credit card at Carleton’s secure giving page at www.give.carleton.edu or you can call the Alumni Annual Fund Office at 800-745-2275. In either case, your gift can be made in monthly installments, which we personally find helpful. Your 50th Reunion Gift can be made in ways described in mailings from the 50th Reunion Gift Committee.

This year please consider two plus one. Two gifts plus you at Reunion. Hope to see you there!

With thanks for your continuing support of Carleton,

Lowell and Gwen Larson
Class Agents
Dear First Name,

We had a great weekend of hard work and planning last month on campus. Being on campus was an invigorating experience for the dozen or so of our class that were there planning our 45th Reunion. You’ll be hearing more about the program in letters and other communications between now and June.

About a half dozen of us met and talked about the Spirit of ’62’s gift to Carleton through the Alumni Annual Fund to honor our 45th Reunion. We would like to raise $850,000 from 70% of our class. This is an increase of more than 10% over our gift in 2002 in honor of our 40th and a major increase over any previous class.

Two classmates are challenging each of you to increase this year’s gift over what you gave in 2002. They will each match the increase dollar for dollar. That means for every dollar increase in your gift another two dollars will be given to the AAF.

As you know, annual unrestricted giving is a very powerful tool for Carleton. Each dollar given to the AAF is equivalent to approximately $22 of endowment. Carleton’s endowment, although growing, is smaller in size and per Carleton student than our peer institutions ranked in the top 10 liberal arts colleges in U.S. News & World Report. Annual giving is also used as a critical factor in college rankings. Both the amount and the participation rate are very important which makes any gift an important gift.

For our 40th your gift was $XXX. We challenge you to make a gift of $XXXX for our 45th. With your help and the matching gifts, we can make this a very successful year.

We are looking forward to a great weekend June 14-17, 2007, in Northfield. We know that exciting things will happen.

Sincerely,

Jim Graves       Polly McCrea
Bob Nelson        Mary Rice
Tony Smith        John Stout

P.S. Remember that your participation at any level is important to Carleton and to the Spirit of ’62.
Dear First Name,

It can’t be 40 years, can it? From the Kennedy assassination and the Beatles on Ed Sullivan our freshman year, through uprisings in U.S. cities and Eastern European countries and important civil rights legislation, to the local floods and the first Super Bowl our senior year, our four years at Carleton were important for us and for the world around us. Isolated in Northfield but attuned to national and international events, we learned and we matured. Those four years were less than 7% of our lives, but if you are like us, their influence was much greater than the time spent. The years were exciting, frustrating, challenging, depressing, overwhelming, exhilarating, and many more things – often all at the same time. But despite all the ups and downs, Carleton became and remains part of us.

Mark your calendars for June 14 – 17, 2007 for the class of ’67 Reunion. It’s time again to reflect on those years at Carleton, to renew old acquaintances, and to make new ones. A phenomenon all of us have experienced at previous reunions is the enlightening conversation with someone we hardly knew at Carleton. There is something about the Carleton experience that gives us a common basis for discussion of topics ranging from personal to political and even to spiritual. We hope to see you and many of your classmates at reunion in June.

It is also time to make an investment in the Carleton of the future. It is important that students today and tomorrow have the same opportunities to benefit from Carleton that we did. Our Class of ’67 Reunion Gift is part of Carleton’s Alumni Annual Fund – an essential part of keeping Carleton great and affordable. Reunion year is a time for all of us to stretch – to give something extra. As we think about the influence Carleton had on us, let’s do all we can to make sure future generations have the same opportunity.

You may know that Carleton is again #1 in the country in percentage of alumni giving to the college. Most important for our class is to meet our participation goal of 67% and help maintain this ranking. Thus, your contribution, whatever its size, will help. And those of us who can afford more, let’s make a difference by doubling or even tripling our support of Carleton this reunion year.

The Reunion Gift Committee has put together a two-part challenge. A group of anonymous classmates has promised to match (up to $100) every contribution from a classmate who hasn’t given in the last three years. Also, every classmate who at least doubles last year’s contribution—thanks again for your gift of $<LAST> in fiscal 2006!—will be matched (up to $100). Let’s make this group dig deep into their pockets for additional support for Carleton.

The Gift Committee will be making phone solicitations in the next few months. It would save us time if you preempt the call by making a donation now. You can send a check or pledge in the enclosed envelope. Alternatively, the college prefers credit card donations through Carleton’s Web site – this is actually the most economical way to contribute. Go to www.carleton.edu, click on Giving to Carleton – Give Online, and follow the instructions. Or, if you prefer giving appreciated stock, contact the college at 800-758-9441 or giftaccounting@acs.carleton.edu for instructions.

Let’s make our 40th reunion the best ever in both attendance and support for Carleton.

Chris Furlanetto                                      John Lemly                                      Gary Sundem
For the Class of ’67 Reunion Gift Committee
It’s dark. Backstage in a Carleton theater. Five minutes to show-time. The only light is from dim bulbs around the make-up mirror, and I can barely make out my costume as I finish my face. I can hear the audience talking and rustling beyond the footlights. But what play is it? I HAVE NO IDEA!

OK, that’s Faye’s stress-dream. What’s yours? Door to the exam room locked? Six weeks in and haven’t bought the books yet? Can’t get your mailbox open? Whatever it is, you’re not alone. And you will be reminded of that at REUNION 2006 next June 15-18. We really hope you can be there – even if you don’t have (or don’t feel like sharing) your own stress-dream.

In the meantime, and even if you can’t make the reunion, we hope you will make an Alumni Annual Fund reunion year contribution. Last year our goals were ambitious, and we missed our dollar goal by just $5,317 (we raised $154,683 for Carleton) and missed our participation goal by 21 people (with 195 of us giving). With your help, we can make our reunion year goals of $250,000 in gifts and 60% (210 people) participation! But we need your gift.

You have not made a gift to the Fund for several years, if ever, and in this reunion year we’re asking you to participate – even a dollar helps us reach our class goals, but we hope you can give more. Please consider a gift of $100 this year.

We don’t need U.S. News and World Report to tell us that Carleton is a great liberal arts college, with great liberal arts students – just like we were. And as it did when we were there, it needs and deserves alumni support – our support. Your gift to the AAF benefits Carleton and helps the Class of 1971 meet its reunion year goals. You can use the enclosed envelope to send your gift or pledge. You can give on-line at www.carleton.edu/alumni/aaf. You can pledge monthly installments. You can write a check. Or call the AAF office at 800-745-2275. You might consider an installment gift or even a gift of stock. Whatever you can give, your support is important.

Thank you. See you next June!
Dear Classmate,

A few members of our class gathered last month to discuss our upcoming 30th reunion and to set goals for our class contribution to the Carleton Alumni Annual Fund. Believe it or not, it was much more fun than it sounds!

We set some challenging goals. We want to set a Carleton record for 30th reunion attendance by having 100 – or more – of the Class of 1977 at our reunion next summer. And we want to raise $200,000 for the Annual Fund. And we want 55% of us to contribute to that amount. Yes, we want a lot. But our class has always been demanding.

Carleton is still much as it was when you left it. The years we spent there as students seem to have caused little lasting damage. This year and every year, the Annual Fund is a way for us to say “thank you” to the College that is still enhancing our personal reputations by getting itself written up in the New York Times Magazine and earning stratospheric ratings in U.S. News and World Report.

In the weeks and months to come, we will be calling and writing to remind you of your intention to contribute to the Annual Fund. But why wait until then? Preempt the solicitation calls and future letters. Go to www.give.carleton.edu or call 800-745-2275 to give today! It’s been nearly 30 years and Carleton needs you as much as ever so it can remain, well, Carleton.

As ever,

The Class of 1977 Annual Fund Committee

Tab Baumgartner  Roger Levesque  Heather Robins
Dear First Name:

By now, you’ve gotten a letter from our 25th Reunion publicity committee that has stolen all of our thunder, but also paved the way for us to follow up with a gift committee letter (No, please! Don’t toss this letter yet!).

Over a quarter of a century ago, we arrived in Northfield, Minnesota and began our four years (or shorter and longer in a few cases) at Carleton.

It’s good to check in with people every quarter of a century or so. Times change, people change. Only last night, Charlie was sitting with his daughter watching Shrek and she affectionately said, “You look like an ogre, too, Daddy, except for the ears.” The same would not have been true in 1982, but that’s why we send these letters out early, to give everyone time to prepare for those magic moments of trying to figure out who is who next June. That’s also why we’ll all get name tags, with BIG LETTERS on them.

A whole bunch of us met in August and talked about everything from how to publicize the reunion and get in touch with all of our friends (and enemies, too, it’s even more fun to see them 25 years later) and what kinds of things we’ll be doing June 14-17.

After rousing discussions about our reunion gift, we decided to be a bit cautious and not try to set the all-time record for 25th Reunion giving – though we’re open to a surprise. We do, however, aim to be in keeping with the typical 25th class increase of at least 5 times our last year’s gift to the Alumni Annual Fund, which was $80,000 from 50% of us. Our goal is to raise $408,200 with broad participation from 65% of the class.

While Carleton is once again #1 in the country among all liberal arts colleges in the percentage of alumni who contribute, we are currently #20 in financial resources in US News rankings. Since we’re ranked #6 overall nationally, Carleton has continued to perform above expectations year-in and year-out. Much of this is due to our generous alumni (that’s us, take a bow!) from all years, but the 25th Reunion gift typically leads the way, and is always one of the highlights of the reunion festivities.

We, the members of the gift committee, are finalizing our own commitments now – several are really challenging themselves by increasing tenfold their last gift; we are all doing the best we can, making “stretch” gifts in honor of our 25th, in recognition of how the college has contributed to who we have become, and to acknowledge what previous alumni did for us. If there’s any year to prioritize your giving to Carleton by digging down deeper than usual, this would be the year. We ask you to join us by considering a gift of $250 or more. Please see the enclosed insert for details.

Please come to our reunion, and help us make our contribution to Carleton one that really helps the college continue to do a great job, bringing good students (regardless of financial need), teachers and staff (and alumni and their families) to one of the most beautiful campuses in the world (even in February), to produce people who try their best to do good deeds and keep the world running and maybe even getting better each year, or at least to fight the good fight.

We don’t all have everything in common, but we did spend some good years here and it’s time to celebrate the past and gird up for the future. Think of our 25th Reunion as a much-deserved pit stop.

Sincerely,

The Gift Gang

1982 25th Reunion Gift Committee

(Don’t send us away empty-handed like the citizens of Northfield did to the James Gang in 1876. We’re a Good Gang, and we’re all on the same team.)
Dear First Name,

Welcome to your 20th reunion year! Many of you may believe that a college reunion is only two or three days long, a single weekend of good times with old friends. Oh, how very wrong you are!

Your reunion year actually started a few weeks ago when you received a letter from the Reunion Planning Committee along with the class directory. It will continue right through next June with a nearly continuous stream of letters, postcards, packages, singing telegrams, emails, and phone calls from classmates.

Never one to beat around the bush, let me summarize the two-part message that will be drummed into your graying and/or balding heads between now and June: (1) We really would love to see you at Reunion, and (2) We also would be thrilled if you would contribute to our Class Gift for Carleton. Got it? Excellent! As much as I would love to see you at Reunion, I will leave Message #1 in the capable hands of your talented Reunion Planning Committee; I encourage you to visit the class website at www.carleton87.org.

With that out of the way, let’s turn to Message #2: We also would be thrilled if you would contribute to the Class Gift. The Alumni Annual Fund is critical to Carleton’s financial health, and reunion class gifts are an essential part of the AAF’s overall goals. If you are already in the habit of giving to Carleton, this is the year to STRETCH your annual gift as much as you possibly can. If not, please start now! Just how much stretching is involved? Well, last year the Class of ’87 raised $53,500 for the AAF. Our goal this year is $187,000. You do the math. Seriously, you do the math – I can’t figure it out.

Lest you think I’m crazy, the Class of ’86 raised $182,000 last year for their 20th Reunion Class Gift. Are they better than we are? I think not. Are they richer than we are? Possibly. In any event, I’m certain that we can set a new 20th Reunion Class Gift record through a combination of high participation (every gift counts!) and leadership giving (some gifts count more than others!!). If you have been giving $100 but can stretch your gift to $500 for one year, now is the time. If you can STRETCH your gift to $5,000, even better! I may be terrible at math, but even I know that we will need quite a few gifts of $5,000, $10,000 or more if we want to meet our goal.

Here’s another idea: give early, give often and earn frequent flyer points you can use to come to reunion. If you visit www.give.carleton.edu right now, you can set up a recurring donation of any amount you choose, to be charged to your credit card every month from now through June. Stretching your gift can be much easier if you pace your giving over several months.

Reunion year reminds us that, even 20 years after graduation, Carleton is hugely important in our lives. Rest assured that we are important to Carleton as well, and not just for our financial support. All of our personal and professional accomplishments reflect upon – and enhance – the entire Carleton community. Nevertheless, we also would be thrilled if you would contribute to the Class Gift. And I really hope I’ll see you in Northfield next June!

Sincerely,

Jeff Levy

On Behalf of the 1987 20th Reunion Gift Committee

P.S. If you would like to join the Reunion Gift Committee and make a few calls (or send a few singing telegrams) to your classmates, we’d love your help! Drop me a line at jeff@corriganlevy.com.
Dear First Name,

Asking for money is never an easy thing to do. In fact, it’s downright painful having to write this solicitation letter. Please know that we’ve spent minutes, even hours, desperately searching for ways to avoid hassling you. Our searches, however, have yielded the same conclusion: without your support and the support of your fellow alumni, which annually totals more than $5.86 million, Carleton would struggle to maintain its standing as one of the preeminent liberal arts institutions in the country. Fortunately, over the past several years Carleton has maintained one of the highest alumni giving participation rates of any college or university in the nation. Reunion classes are responsible for much of the heavy lifting required to achieve such outstanding results.

Don’t assume that because the aggregate alumni contribution is so large your individual donation is somehow immaterial. Even gifts of less than $50 add significant value to the campaign to keep Carleton strong. Your gift encourages others to give – we find our strength in numbers. With your help, we can achieve our record-setting 15th reunion participation goal of 64.1% and our giving goal of $110,000, which represents a 44% increase over our 10th reunion giving total.

In the upcoming months your classmates will encourage you to return to Carleton for reunion, June 14-17, 2007. They will also ask you to make a S-T-R-E-T-C-H gift in honor of our reunion. We appreciate your support last year and hope that you will continue your commitment to Carleton this year by joining the Presidents Club with a gift of $300 or more. Please give online at www.give.carleton.edu or by calling 800-745-2275.

Join the team! Help make reunion weekend a time to celebrate Carleton, friends, and record-setting accomplishments.

We wish you and your family all the best.

Class of 1992 15th Reunion Committee
Dear First Name,

You recently received a letter from one Steven R. Lewis, Jr. regarding your 10th reunion. As the current president of Carleton College, I ordinarily write a letter first but actually HAVING A JOB got in the way.

Of course none of you know me as well as former President Lewis. You don’t have a bobble head of me on your desk, you don’t call me Skeech, or any other affectionate nickname, and I didn’t secure a new Schiller bust for you and make a trade along the banks of the Cannon. Let me assure you, however, that I am just as cool as your Mr. Botswana. I mean, does he speak FIVE languages, can he fly fish? Hmmm, no and no.

But on to the point…I am throwing down my gauntlet and am now committed to a little duel with Skeech. Not in the literal sense (he wouldn’t last a minute), but in the figurative sense, with figures, as in $$$ figures. Get it? Good! And I must persuade you to help me in this lofty endeavor. Under former President Lewis, your class became the record holder for 5th reunion Alumni Annual Fund participation – a nice going-away gift to Skeech, for sure. We are now on the eve of your 10th reunion, and records are made to be broken. Know what I mean?!

Come on, I can’t let this Lewis character have a more profitable presidency than I. To really rub his nose in it, I am after 70% participation and a $70,000 class gift. And so it is that I implore you, sift through your sofa cushions, cash in grandma’s birthday check that’s sitting on your dresser, sell that bobble head on E-bay, or even set aside a little monthly donation from your paycheck. I’m asking. The students are asking. Shoot, even the cows in town are asking.

Soon you will be hearing from one of your fellow Carls who I’ve recruited to solicit donations. If recent memory serves, you generously gave $xxx to Carleton last year. Thank you! It is because of our wonderful alumni that Carleton continues to thrive. Because it is a reunion year and we’re out to break records, we’ll be asking for a little more this year – $xxx. As always, we here on campus truly appreciate every donation. There’s even a website where you can make your contribution: www.give.carleton.edu. (Pretty snazzy, eh?)

This is your Big 10! Your 10th reunion! Your silver dime! Your premiere decade! What better way to recognize your roots, (and benefit my cause), than to give to Carleton?! Go check out that class webpage (www.carleton97.com) and watch your mailbox and in-box for information on “pre-union” activities in your area.

Sincerely,

Robert A. Oden, Jr.

*The views expressed in the above commentary are those of the Class of 1997 Reunion Committee, and do not reflect the opinions of Robert A. Oden, Jr., his employer, his parents, or affiliates, but maybe his dog.
Dear First Name,

In our four years at Carleton, the class of 2002 had to cope with nonstop construction on campus. In fact, in the 12 terms we had at Carleton the only—only!—term that did not have any building projects was Spring Term, Senior Year. Funny that the same term Carleton took a break from building, we took a lot of breaks, too.

In truth, just as Carleton has not stopped improving the campus since we graduated, we too have been "under construction" these last five years. We are each like a construction project, framing our future, building ourselves professionally, personally, intellectually, and creatively. While we are not done yet (and won't be for some time) Carleton has been an essential part of our foundation.

Our 5th Reunion Year is the first opportunity to formally look back and see how far we've come. It is also a chance to give back to the college and recognize the important role it has played in our lives and the role it will play in the lives of future students. We hope you will support the Alumni Annual Fund this year with a gift of at least 3 times the amount you gave to the school last year. This gift might seem like a stretch right now, but in a reunion year, we have the unique opportunity to return to the campus and see our gifts in action. This is a special gift for a special occasion, and we sincerely hope you will support the college.

We’ve set a goal of $30,000 for our Class Gift. Because every contribution helps us towards that goal, we are aiming for a 68% participation rate. Your gift can be made using the enclosed envelope or by calling 800-745-2275. Actually, if you want to save a stamp or a phone call, the best way to give is at www.give.carleton.edu with a debit or a credit card. Even better, your gift can be set up in installments so that it feels a little less draining on the wallet.

What does the money go toward? Why give? I paid tuition, so I'm done now, right? Well, when you were a student, your tuition covered less than half of the actual cost to teach you all that stuff you've already forgotten. The rest of the tab was picked up by alumni gifts and the endowment. The Alumni Annual Fund in particular is so helpful to the college because it covers operating expenses, salaries, need-based financial aid, as well as new projects and programs that didn't exist yet while we were on campus (sorry!).

We look forward to seeing everyone—or as close to everyone as we can get—in June at the Reunion!

Sincerely,

Your 5th Reunion Gift Committee

Leah Daniels, Kenechi Ejebe, Erin Ellis, Andrew Eppig, Matt Erni, Micah Evans, Gabe Fine, Hite Geffert, Erik Hanberg, Carrie Hinterthuer, Angelica Koch, Philberta Leung, David Niles, Melissa Poulsen, John Riske, Alyssa Thomas, Andy Wixon, Emily Yueh
Email Solicitation Samples
LEADERSHIP

I could pretend I was just checking in to see how you are, but, alas, I was roped into making some Annual Fund calls. Hence, this email!

You are on Carleton's most-generous list and your gift each year constitutes a significant contribution to the 1986 goal. If you could decide on your gift amount for this fiscal year and let Carleton know of your pledge, it will help our class' efforts a great deal. The fiscal year ends in June, so there is no rush to contribute yet, however, we are seeking pledges from everyone now.

The last two years you gave $5,000 per year. If you could maintain or increase that amount this year, it would keep us right on track. I am given an "ask" amount for each person, however, I hate to push that number, as everyone's situation changes from year to year. For the record, yours for this year is $6,000. Given your record of giving in the past, I am sure you will contribute a helpful sum -- I'll let you make that call.

If you don't have one of those Annual Fund envelopes on your desk at home, you could email Beth Dahle at Carleton with your pledge amount. (BDahle@acs.carleton.edu) I hope you are enjoying life in New York. I lived on Long Island with my husband and kids for a total of five years and loved being on the east coast. We now live in Sonoma County, California, which is a wonderful place.

Thanks again for all your help! Happy New Year,
Susan

REUNION

Nathan,

By now you have probably received some items related to Reunion. With a goal of $93,000, we have our work cut out for us. It should come as no surprise to you to hear that we can only raise this much money with the generous support of a select few of our classmates who are in a position to make sizable donations. We hope to assemble a group of leading donors quickly to set an example to the rest of the class and I hope you can be a part of this group.

Thus I am hoping you can stretch this year and make a donation of $1,000. You can donate online with a credit card in installments (ease the pain, get the miles) here: www.give.carleton.edu.

Obviously, any donation is appreciated. Best wishes for a happy and healthy New Year,
Derek

Hello! I hope you don't mind hearing from me one more time with one last pitch before I head back to Northfield for our 15th reunion.

You have been a valued contributor to our class gift in the past, and I'm hoping you will be willing to join us once again as we shoot for a record-breaking 15th reunion gift.

Keep in mind that any gift you make at this point will be matched by members of our class, so your donation will have double the impact for Carleton.

I hope that I'll see you next weekend on Davis Beach, but even if you are unable to join us this year, please let me say that the college is grateful for the continued connection with it that you have shown with your past gifts. We hope to see you soon at another Carleton event.

Thank you for your consideration...

On behalf of the Reunion Committee,
Francie Spangler '91

www.give.carleton.edu
Dear Carleton College Classmates of 1994,

Whether it be washing dishes at the Goodhue cafeteria, holding up for an all-nighter on third Libe, playing 'bee on the Bald Spot or long-term "borrowing" of Carleton athletic department practice gear, we all can thank Carleton for unique experiences, memories and annual solicitation emails like this. As you know, Carleton was recently ranked #1 among all institutions for having the highest percentage of alumni who make a financial contribution, in some amount, back to the school. Number 1. Carleton College. It has a nice ring to it.

In order to keep this position, we need you to act quickly. The deadline for this year's 10-year reunion giving is June 30th and a contribution from you, whether it be $20 or $100, would go a long way toward accomplishing our participation goals. Please consider giving back this year. Instead of getting a pepperoni pizza, how about finding something in the fridge that night and using the money for a Carleton contribution?

Giving has never been easier. Please use the link below, spend 2 minutes of your time, and do something nice for the institution that did so much for all of us.

Hope to see all of you at reunion June 17-20.

With Carleton pride,
The Class of '94 Gift Committee

Give online at www.carleton.edu/alumni/aaf

____________________________________________________________________________________________

Dear Friends and Classmates,

We are in the final stretch, two weeks from Reunion on June 16-19, and very short of our fundraising goals. I apologize that I have not sent e-mails nor called you repeatedly asking you to give. It is as uncomfortable for me to ask you for a gift as it is for you to consider how much to give. This is a very personal decision; one that I would ask you to explore.

Please consider your giving history and future with Carleton. Have your accomplishments resulted in part from your educational and social experiences at Carleton? Did your professors help prepare you to think critically, analytically and creatively about issues both at work and in the world? And, finally, did you have a fun time at Carleton?

Your individual gift matters. Only with your commitment can we ensure that future generations of Carls have experiences similar to yours and mine. I appreciate your taking time to think about giving to the College. And, I look forward to seeing you at Reunion.

Sincerely,
Class of 95 Reunion Gift Committee

p.s. The online giving link - https://webapps.acs.carleton.edu/alumni/aaf/how/online/?_step=GiftPageOneForm
The committee is also making calls over the next few nights and weeks and we hope to speak with you soon.

____________________________________________________________________________________________

Good afternoon, Judy!

I am working with Alison Keith on the Alumni Annual Fund and our 40th reunion gift. I notice that your record says do not phone solicit. I hope a brief e-mail is okay. We are shooting for a participation record for our 40th. There is no pressure on dollars, as we have already made our goal. Would you consider a modest gift of $10 or $25 to help us? You can give online or you can call me, and I can take a credit card gift.

You should also consider attending the reunion. Our class is putting on many of the programs from recitals to plays to lectures to wine tastings. I know that you would enjoy it.

If you want to make a credit card gift, you can call me or you can call the Annual Fund office at 800-745-2275.

Carleton thanks you for your consideration!
POST-REUNION

Many of our Carleton classmates, including you, gave generously as a part of our 25th reunion gift last year. I am writing to ask you to consider making a gift to the 2003-2004 Alumni Annual Fund, as Carleton's current fiscal year ends on June 30, 2004.

Though our class dollar goal is considerably lower ($78,000 - it has a nice ring to it!) we hope to sustain our reunion enthusiasm with our typical high class participation. At this point, our class seems to have a case of the "post-reunion blues" as our participation numbers are trailing their usual pace. Your gift, at the level appropriate for you this year, will be much appreciated.

One convenient way to give is through the Carleton web site at the following link: www.give.carleton.edu.

I thank you for your great gift last year, and hope that you will help us out again this spring. We want to do our part to help Carleton maintain its #1 national ranking in alumni participation!

Almost one year ago, we found ourselves frolicking on the Bald Spot, having cocktails with President Oden, marching proudly in the parade of classes, and dodging streakers at the Class of 79 midnight disco inferno in Sayles-Hill. If you were able to attend, we hope you enjoyed the 25th reunion as much as we did!

While our class giving goal has appropriately shrunk from last year's big reunion push, we still need your support and your participation for the important ongoing needs of the College through the Alumni Annual Fund. Because you've given generously in the past, we hope we can count on you again this year. The "year" ends on June 30th, which is not so far away. Please consider making your gift right now, on line. Here is the website link: https://webapps.acs.carleton.edu/alumni/gift/; or call the AAF office at 800-745-2275.

Thanks for continuing to include Carleton in your giving plans and for your ongoing support of our alma mater.

PLEDGE REMINDER

Dear Classmate,

If you are receiving this email, it's because, according to the fine folk at Carleton's Alumni Annual Fund, you are an extremely thoughtful, generous, and giving person - esteemed by your colleagues and held in high regard by all around you. You are wise beyond your years, thoughtful, kind, and nice to children and small animals. You are an intellectual genius, considered quite attractive, and a good speler.

You've also made a pledge to the Alumni Annual Fund, and haven't gotten around to sending in your payment yet. Since we're nearing the end of Carleton's fiscal year (it comes at the end of June - that's a few short weeks from now), would you mind either calling the Fund at 800-745-2275 or logging on to their website at https://webapps.acs.carleton.edu/alumni/gift/ and making good on your pledge? Increasing the size of your gift is strongly encouraged, however decreases and/or non-payments are expressly forbidden under the terms of the Geneva Convention, NAFTA, NATO, AFL-CIO, SEATO, NAMBLA, SALT, SALT II, and the MIAC, as are any broadcasts, re-broadcasts or reproductions of this email not used for this express purpose of convincing other classmates to give).

Speaking of other classmates.... If you know of anyone who hasn't given yet, would you mind taking a moment to encourage their generosity? As of this writing, we are 41 donors short of hitting a 63% participation level, which would be a new record for a 15th-year reunion class. So every donor counts (I'm told donors from certain counties in Florida can be counted several times if needed). Thanks for your help and for your continued support of Carleton. I hope to see all of you next week at Reunion!

Dave Hoppe, AAF Class Agent '89
I'm taking time to write to you today on behalf of Carleton. I see that you recently made a pledge of $1,000 to the Alumni Annual Fund. Thank you very much! I'm now following up as an AAF volunteer. I like to have an excuse to get in touch with people to catch up and I'm always happy to ask about money on behalf of Carleton!

As you may know, Carleton's fiscal year ends on June 30. Pledges need to be paid by then in order to count for the 2004. However, this year, an anonymous alum put some challenge money as an incentive to encourage volunteers to wrap the year up a bit earlier than the absolute last minute. If we reach our participation goal by June 15, an additional donation $15,000 will be made on behalf of our class.

We only need 54 more classmates to fulfill pledges or give by June 15 to do it! (Last year, 56 classmates gave during the last half of June.) So with your help, we should be able to meet this goal! We just need to give a week or two earlier than last year! I'd love to see our class meet this goal if we could, so I'm simply writing to encourage you to fulfill your pledge before June 15 at https://webapps.acs.carleton.edu/alumni/gift/.

Anyway, thank you again for your pledge. It is really, really appreciated!

Francie

PRELIMINARY DONOR LETTER

Hi Cathy,

I hope you and Jonathan are doing well. In just a few days, a letter to all our classmates in 1989 will go out, detailing donors to our class to date. Since you are a loyal donor to our class, I wanted to make sure you were listed on this letter.

The cutoff date for all alumni to make gifts to be included in this letter is March 15. This is a as a courtesy reminder TO MAKE YOUR GIFT TODAY! I hope you will make a gift of $1,000. This is also a big help to the volunteers in our class, as we all look to make less work for ourselves at the end of the fiscal year. We often have a big panic at the end, and not just in reunion years.

Please go to www.carleton.edu/alumni/aaf or call 800-745-2275 to make your gift today! Thanks - and look for your class letter soon.

Carrie

FISCAL YEAR END

Hello Class of 1976!

You may not have realized this, or you may have forgotten, or it may be buried in the bottom of your mental inbox. . . Carleton College's Alumni Annual Fund misses you, and the fiscal year is drawing to a close on June 30.

We have something important and special in common (sounds sort of dangerous). That something important is that we all share memories of our undergraduate years at Carleton...great professors, camaraderie, the arb, cows, colleges, and contentment, etc...

As volunteers for our Class of 1976, we give to the Alumni Annual Fund and ask you to join us. If you and every classmate who has not given this year gave $19.76 or even $7.76, it would make a huge difference to our overall participation! Please give by June 30. Thank you in advance!

The AAF will gladly accept donations both over the phone and online. Just surf from this email to your browser at https://webapps.acs.carleton.edu/alumni/gift/ or make some student earn their work-study check by calling the AAF directly at 800-745-2275.

Your AAF Class Volunteers,
Dear Fellow Carl:

As Spring melds into yet another Summer, I am happy to report that the legacy continues: I have taught the last of my three kids how to throw a decent Frisbee forehand. Given that I didn't learn this integral skill until the end of my freshman year at Carleton, I figure that my children have a terrific head start on their core college subjects.

But seriously, I am writing to encourage you to consider another type of legacy. With full adulthood looming (42 is the new 20, isn't it?), I am increasingly aware that the most important measure of success and satisfaction is not what I have, but what I can give. Although I do not have the means to donate a building, endow a professor's chair, establish a scholarship, or afford every student a choice of three flavors of ice cream at every cafeteria meal (oh thank you eccentric alumni!), I can participate in the LEGACY of giving to Carleton. You can, too.

Please make your gift to the Alumni Annual Fund TODAY — the end of the giving year is June 30th. You will be part of the legacy of giving that perpetually supports the Carleton educational mission. It is EASY! Either give online at www.give.carleton.edu, or give the Alumni Annual Fund a call at 800-745-2275.

Thanking you in advance for the overwhelming response to my inspiring message, I remain

Jonathan Pearlstein, '86
Carleton College Alumni Annual Fund Board.

Subject: Why I Give to the Carleton Annual Fund

I wanted to write one last email requesting your support for the Alumni Annual Fund this year. In April my daughter Sarah was accepted at Carleton. However, she was not offered any financial aid. We appealed and were turned down. At first I was angry, but when I thought about it, I realized that our family's income should put us out of reach of need-based aid at Carleton. I had run the calculators and realized that need-based aid was a long shot. I had hoped beyond hope that we would receive some aid because Barb and I were alums, because Sarah was so academically deserving, because she had curly hair, because I was such a nice guy, because etc. etc. etc...

But the answer was no and it should have been. As it turns out Sarah has decided to go elsewhere for a number of reasons, some of which are financial.

Although it may seem counter-intuitive, our experience with Carleton's financial aid process is one reason why I have given to AAF in the past and why I will continue to give in the future. Because I had a nephew attending Carleton, I have spent quite a bit of time there in the last few years. I have met many students (my nephew included) who if not for need-based aid, would not have had the opportunity to attend Carleton. All of these students required the aid more acutely than Sarah. I want to support an organization that delivers its financial aid funds to those most in need.

OK, I've said my piece, now the pitch. The AAF is still short of its goals for the year. The Class of 72 is likewise short of its goals. The fiscal year ends on June 30 and we would very much appreciate your participation before that date. Help us support those students with the greatest need. I will make it very easy for you. Go to www.give.carleton.edu and get out your credit card.

I thank you. The members of the class of '72 AAF committee thank you, and those students who are the recipients of your generosity most certainly thank you.

Bob
Expense Policy

Thank you for volunteering for the Alumni Annual Fund!

In accordance with Carleton College policy, volunteers may receive gift credit and/or reimbursement of expenses incurred while conducting College business. While volunteers are strongly encouraged to contribute their expenses, the College does not wish to limit the participation of any volunteer because of financial restrictions. Donated expenses will be treated as unrestricted gifts to the Alumni Annual Fund.

You can donate or be reimbursed for the following expenses:

- **Air Travel:** The cost of your 30-day advance-purchase round-trip coach airfare.
- **Transportation between the Minneapolis/St. Paul airport and campus:** Round-trip cost of transportation up to $90.
- **Car Travel:** Mileage between your home and campus at 14.5 cents per mile, or the cost of a 30-day advance-purchase round-trip coach airfare, whichever is less.

Food and lodging are not reimbursable for CAVE as the College is providing all meals and rooms in the residence halls for all volunteers.

To donate your expenses or receive reimbursement, complete the Statement of Volunteer Expenses (available online at www.go.carleton.edu/cave or by calling 800-745-2275) and return with your receipts to:

Carleton College Alumni Annual Fund  
205 East Second Street  
Northfield, MN 55057

Please contact the Alumni Annual Fund at 800-745-2275 or aaf@acs.carleton.edu with any questions regarding this policy.
PURPOSE
To provide Alumni Annual Fund volunteers with an understanding of the standards regarding dissemination and disposal of confidential information.

GUIDELINES
1. Information provided to AAF volunteers throughout the years is considered strictly confidential.
   *This information is to be used by Class and Assistant Agents solely in the performance of their duties as volunteer fundraisers for Carleton College.*

2. Information shared with volunteers should be done on a “need to know basis”.
   *Class Agents are responsible for communicating this policy of confidentiality to volunteers at the time of transfer of confidential materials.*

3. Information may not be transferred to any party outside the AAF volunteer system without prior approval from the AAF Director.

4. The information received is not to be used for any purpose than that for which it has been provided.

5. Proper disposal of confidential information includes manual and electronic shredding or return of information to the Alumni Annual Fund.

Alumni Annual Fund Board members, Class Agents, Assistant Class Agents, Gift Committee members, Alumni Annual Fund staff, and other parties involved in Alumni Annual Fund communications are required to adhere to this policy.