Thank you for volunteering as a Class Agent!

Thank you for your service as Class Agent. By taking on this role, you are setting an example for Choate Rosemary Hall alumni around the globe. The Class Agent handbook will be a useful roadmap as you begin your outreach.

As an alum, you are uniquely positioned to connect with classmates through shared memories and experiences. Your authenticity makes your outreach stronger and helps keep classmates invested in our success.

In this handbook you will find information about Choate’s mission, vision, and values, as well as the important role philanthropy plays in ensuring that we can continue to offer the very best education to students of all backgrounds.

Simply stated, our goal is to encourage as many classmates as possible to make a gift to the School. I hope you will find the experience both fun and rewarding!

Thank you for serving your class, current and future students, and your School through your work as a Class Agent. Choate Rosemary Hall is an exceptional place because of volunteers like you!

With grateful thanks for your participation in this effort,

Priti Kapoor
Coordinator of Volunteer Programs
pkapoor@choate.edu
(203) 697-2353

For more information on the Class Agent Program as well as helpful resources, visit www.choate.edu/alumni/alumni-resources
The Four Goals of a Class Agent

Class Agents are the primary contact between Choate Rosemary Hall alumni and the School.

Your role in the Class Agent Program is to help us to achieve four main goals:

1. Increase class participation
2. Increase overall alumni participation
3. Increase the amount of giving from alumni
4. Keep alumni connected to and engaged with the School
Class Agent To-Do List

LEAD by example: make your own gift before you reach out to classmates

CONTACT 5-7 classmates

SHARE Choate Rosemary Hall news with your classmates

ASK each classmate for an Annual Fund gift

THANK those who give!

STAY in touch with Priti Kapoor:
    pkapoor@choate.edu; (203) 697-2353
Reasons to Give to the Annual Fund

1. Your gift to Choate Rosemary Hall is an investment in the future, because our alumni go into the world and accomplish great things.

2. Tuition does not cover the full cost to educate Choate students; the Annual Fund provides 10% of our operating budget each year. Those unrestricted, current-use funds give the School the flexibility it needs to address its most pressing issues.

3. In the Annual Fund, there is strength in numbers. Last year, gifts of $250 or less, added up to more than $300,000. In other words, your gift adds up to a big impact at School.

4. Your gift means more than just dollars and cents. Your gift—at any level—signifies your belief in the transformative power of a Choate education.
6 Tips for Successful Solicitations

Find common ground. Did you share a class, a dorm, a sport? Do you live in the same town? Work in the same profession?

Make it personal. Share your reason for giving, and then invite your classmates to join you.

Don’t forget to thank for past support. You are not only showing gratitude; you are reminding the person that this has been a priority in the past.

Stress participation – all gifts matter.

When emailing, consider your subject line. What words would make you open an email? One example is “Susan – hello from Choate!”

Share the link to give online: www.choate.edu/donate
Sample Phone Script

Hints for Making Phone Calls:

- Start by talking about the School and sharing current information
- Thank for past support (where applicable)
- Ask for the amount provided on the contact sheet, or suggest a narrow range

Sample Phone Script

Hi, is ______________ available? This is ______________ your classmate from Choate Rosemary Hall. How have you been? (Insert personal message here).

I am calling to invite you to join me in making a gift to Choate Rosemary Hall this year. Would you consider renewing your support with a gift of $X.

If YES

Thank you so much!

(Fill out enclosed business reply envelope and return to the school)

If NO - See response to common objections on page 8
Hi Meg,
Hope you and your family are doing well today.

{Insert personal message}

I am volunteering as a Class Agent this year for Choate Rosemary Hall and am contacting you on behalf of the Annual Fund. I just made my donation and I hope you will join me!

Last year, 4,590 alumni, parents and friends came together to support the School and collectively contributed more than $6.3 million to the Annual Fund. Gifts to the Annual Fund are put to use in the areas of greatest need at the School – providing financial aid, classroom resources, athletic equipment, art supplies and so much more.

You can make your gift at: www.choate.edu/donate.

Thanks very much for your time and attention.

Warm wishes,
Jane
4 Responses to Common Objections

Objection: “My gift won’t make a difference.”

Reply: “Annual Fund gifts added up to $6.3 million last year – that’s the equivalent of the yearly draw on $150 million in the school’s endowment. Your gift, combined with others, adds up to make a big impact on today’s students and faculty.”

Objection: “Does Choate really need my contribution?”

Reply: “Yes! Choate tuition does not cover the full cost to educate a student. Every student at Choate benefits from your support. In addition, 33 percent of our students receive financial aid. We are able to offer support to families who could not otherwise afford a Choate education because of the strong support of our alumni, parents, and friends.”

Objection: “I can’t afford to give $XXX. (OR I support other causes. I lost my job. Etc.)”

Reply: “Giving to Choate is not just about the amount. Participation in the Annual Fund signifies your belief in the power of a Choate education. Gifts of all sizes are important, and combined with the gifts of others, add up to make a real difference on campus today. Please consider a gift that feels comfortable for you!”

Objection: “My child was not accepted.”

Reply: “That’s certainly disappointing. I hope that your child has found a good fit elsewhere. I hope you will remain open to giving back in the future.”
Increasing the Impact of a Gift

Your classmates can increase the impact of their gifts in a couple ways. If it seems appropriate to do so, encourage them to consider the following:

**Corporate matching gifts**
Matching gifts can increase the size of a gift. Check the link found at the following location to see if a classmate's employer participates in a matching gift program: www.choate.edu/donate.

**Recurring gifts**
A recurring gift is an easy way to increase giving because small monthly donations can add up to a larger Annual Fund gift! Classmates can set up a recurring gift here: www.choate.edu/donate.

Leadership Giving

Your classmates may be interested in giving at levels that afford them recognition and membership in the 1890 Society:

**Trustees Circle:** $50,000 or more  
**President’s Circle:** $25,000-$49,999  
**Mellon Society:** $15,000-$24,999  
**St. John Society:** $10,000-$14,999  
**Ruutz-Rees Society:** $5,000-$9,999  
**Ayres Society:** $2,500-$4,999
Ways to Give

Online
www.choate.edu/donate

Telephone
(203) 697-2353

Mail
Choate Rosemary Hall Annual Fund
333 Christian Street
Wallingford, CT 06492

Classmates can also gift mutual funds and securities to the School. Please refer donors interested in these options to Ana Aleman, Securities Coordinator, at (203) 697-2387 or aaleman@choate.edu.

Please direct individuals interested in discussing options for planned giving to Barry Tomlinson Director Planned Giving, at btomlinson@choate.edu or (203) 697-2071.
Contacts

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Social Media

www.facebook.com/GoChoate

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instagram.com/choatealumni
instagram.com/GoChoate