Best Practices – Major Reunion Campaigns

· **Advance Planning**: Start early, and think about what each major reunion represents. A 5th has a different feel from the 25th. Focus on what is special about each one and be very strategic.

· **Volunteer Committees**: Consider the size of each team (participation and special gifts). Be careful to have representation from all segments of the class. The Critical Few component is very important and you can’t reach dollar goals without them. There is no “right” size. Classes have been successful with large committees or relatively smaller ones, but even the smaller committees have been carefully chosen and include people capable of effectively reaching everyone in the class. Usually there is a core group of people who may be relied upon to really “get it done.” Use the concept of a “big tent” to be inclusive, but you have to know who is going to really do the work.

· **Solicitation**: Make solicitation assignments with care and be flexible if you need to change solicitor mid-campaign. Make it personal; face-to-face is best for top asks. Put your best solicitor on the prospects with high capability but modest prior giving histories. Get to donors early to avoid preemptive gifts. Create “go-back” lists and keep adding to them. Try to always keep the door open.

· **Progress Reports**: It is important to have regular conference calls with solicitors to keep everyone motivated and accountable. Preparing for calls gets people moving.

· **Screening**: Classes should do as much vetting as possible within the class. These are volatile times and there are often big surprises with people’s financial picture, both positive and negative.

· **Advance Funds**: Many classes use them effectively, some as many as four years ahead of time, but they need to be directed at the top tier of prospects.

· **Building and Keeping Momentum**: Secure lead gifts as early as possible. You want to keep people motivated by showing good progress, but in a way that keeps everyone working – you don’t want anyone to think it’s a done deal. Typically, a lot of the early progress is in pledges. It is usually a good idea to feed pledges into the total you report to the class gradually, so that you show consistent progress. Don’t put too much up on the scoreboard too early. After all, pledges don’t really count until they are paid, and you want to keep momentum for the end of the campaign. There are always other aspects of the campaign to focus on, most importantly participation, to avoid the “we’re done” phenomenon.

· **Events**: A kickoff event with a lot of volunteers is important. Use class VIPs to inspire. Try to have a range of events, both formal and informal. Make sure the AG team is in sync with the Reunion planning. The Princeton Class Leadership Conference is a good kickoff, but dinners and receptions around the country are very helpful. The more folks who know about the University and the benefits of AG the easier our jobs will be.
· **Training:** Is especially important in younger classes. Lead with the Princeton story and why the University needs AG funds. You are really selling “the story.” You need to build a comfort level with your committee to be sure everyone understands the case for supporting Princeton and the objectives of your major reunion campaign so that they are fully ready to make the personal connections you are counting on. Don’t assume that everyone knows the story and how to go about approaching their assignments.

· **Joint Asks:** Coordinated solicitations are critical for any prospects being asked at the same time for a substantial major reunion gift and a restricted capital gift. We need to minimize the risk of prospects being approached in a confusing way because of ineffective planning and coordination. Rely on the staff to be conscious of any situation in which a capital solicitation may be in play and to involve the appropriate leaders of a class’s major reunion campaign in the planning. When the actual approach is made, it may include a trustee or someone else outside the class, but the idea is always to present the prospect with a comprehensive proposal that prominently includes an appropriate amount for the class’s major reunion campaign.

· **Communications:** How best to communicate to the class how things are going? Use multiple letters and authors, a regular schedule, and have something to say with each communication. Having a big team allows for many names on the masthead, which will signify to everyone in the class the importance and breadth of the effort. Various times of the year are critical—October, December (calendar year-end), May, and June. It is best to err on the side of over-communicating during a major reunion campaign.

· **Reunions Weekend:** There needs to be a sensitivity around the Reunion itself. Annual Giving communications can be included in a subtle way. Quick follow-up with the committee to capture the Reunion after-glow is important. Have some members of the Reunion team on the AG team. It is valuable to have supportive class officers. They don’t have to be involved on a day-to-day basis, but their visible support and encouragement are important.

· **Challenges:** Challenge Funds are often utilized during a major reunion campaign as an incentive to stimulate increased giving and participation. They can be structured in various ways, and the staff can provide particulars on challenges that other classes have used successfully. It is important to allow plenty of lead time to create an effective plan and assemble the funding so that the implementation of the challenge will have the greatest possible effect.