



Office of Annual Giving: 866-729-0315

Recap: Fall 2009 AF Volunteer Conference Calls & Webinar
Wednesday, September 30 at noon and Wednesday, September 7 at 2 p.m.

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Welcome: Jon Hysell '72, P'04, director of annual giving

- Thank you for joining us, volunteering for Hamilton and for leading the way to Hamilton's future;
- Your support is essential for the success of the Annual Fund, the lifeblood of the College;
- Volunteers are successful because of the truism that "people give to people".

Bio of Alumni Trustee and Co-Chair of the 2009-10 Annual Fund Greg Robitaille '85

- Greg graduated with a degree in English Literature and, for the past twenty years, has made a habit out of serving the College. He was a member of the Alpha Delta Phi fraternity and played baseball and rugby, but perhaps his biggest coup while on the Hill was meeting his future wife, partner and Annual Fund Co-Chair, Beth Pfitzenmayer '85. After graduation, Greg began working in investment and commercial banking and went on to earn his MBA from Columbia University, after which he worked with a number of financial services firms before taking on his current role with Water Street Healthcare Partners as director of corporate development. Greg began his four-year term as an Alumni Trustee on July 1, 2009 and will serve as Co-Chair of the Annual Fund for the next two years.

College Update: Greg Robitaille '85

- Thank you – underscored impact of Class Agent volunteers.
 - Statistics support the effectiveness of volunteers;
 - Calling friends for support can be challenging, but it's worth it – last year's results are proof of how alumni volunteers can make a difference.
- No one was a bigger advocate for the Annual Fund than Mac Bristol '43, who passed away in August. Mac, who was Chairman Emeritus of the Board of Trustees, was the College's

largest single donor. Mac's life was emblematic of what thousands of alumni chose to do – faithfully support our college.

Admission

- The 466 members of the Class of 2013 are on campus and nearly halfway through their first semester;
- 4,661 total applications, reflecting an 8% decrease over the prior year's record-high total, still the third largest applicant pool in Hamilton's history;
- Accepted 1,390 applicants (including 18 waitlist admits), resulting in a 30% acceptance rate. This compares to an acceptance rate of 28% for the past two years and 33% in 2006. This is only the second time since 1986 that we have admitted fewer than 1,400 first-year applicants.
- The most diverse class in our history. Twenty percent have identified as multicultural students from the U.S., which compares to 19% last year and 18% in 2007. Six percent is comprised of international citizens, which compares to 5% in the prior two years.
- Average SATs for the class reached a record-high 1377 (critical reading and math combined), which is 11 points higher than last year's average and reflects a 50 point jump since 2004.
- Hail from 36 states and 23 countries; this compares to 33 states and 17 countries last year and 39 states and 20 countries in 2007.
- Women make up 52% of the class, which compares to 56% last year and 53% in 2007.
- Nearly half of the class is receiving need-based scholarship from Hamilton totaling roughly \$6.3 million. This is our second class in more than a decade that was recruited without merit scholarship dollars.

Fundraising

- The College implemented a rigorous budget review and decreased costs by 5% this year, with an anticipated 5% cut again in 2010-2011. All departments, except for financial aid, have seen cuts.
- In FY09, the Annual Fund achieved dollar goal (\$6 million) and participation rate increased from 52.2% to 52.4%
 - Especially impressive in this economy and due, in large part, to the extensive work of volunteers and loyal alumni.
 - Most peer colleges reported declines in both dollars and participation.
 - Over \$16 million was raised in FY09 from all sources, a 30% decline from the previous year which is consistent with what peer colleges realized.
- Continuing to assess impact of financial crisis on the College's Endowment; by most measures the value has decreased roughly 28% from its height in October of 2007.
 - Currently valued at \$550 million
- Began 2009-10 year with 1850 full-time degree-seeking students (vs. 1834 a year ago)
 - Student retention continues to increase; first-year to second-year retention has been approx. 96% for the past two years compared to 93% for the prior three years

Athletics

- Hamilton will be fully integrated into the NESCAC (New England Small College Athletic Conference) beginning in 2011-12
 - Remaining 7 teams will join the conference
 - Field hockey, men's and women's lacrosse, soccer and basketball
 - Hamilton's other 21 teams will continue to compete in NESCAC
- Steuben Field received a new turf surface this summer thanks to the generosity of a \$1 million challenge from an anonymous donor and gifts from a number of football,

lacrosse and other alumni. The new surface was in place for Hamilton's home opener against Amherst (a loss) and the second game (Fallcoming) against Wesleyan (a victory!).

- Details for all athletics can be found on the College's Web site, www.hamilton.edu/athletics

Facilities

- In addition to the completion of a new, gift-funded, turf surface on Steuben Field, Martin's Way was also completed this summer.
- Construction is underway at Emerson Hall (formerly ELS) and the renovation and expansion is on budget and on schedule. This project moved forward because of gift-funding and advantageous contractor bids due to the economic downturn. Construction will be completed in August 2010 and will become the new heart and soul of campus.
- Kirner-Johnson renovation is completed and the building was dedicated over Fallcoming weekend.
- Arts Project plans are moving forward and the architect, Machado and Silvetti, have submitted their initial proposal. Current plans call for a \$60 million project, which will not begin until the majority of funding is in hand.

Notable achievement and events

- Afro-Latin Cultural Center and Higher Ed Opportunity Program celebrate their 40th anniversaries this fall
- Hamilton is the hub for a consortium of six Upstate NY liberal arts colleges that will use a \$100,000 planning grant from the Andrew W. Mellon Foundation to explore collaborations that control costs and investigate best practices in student life and staff development
- President Joan Stewart is serving as 2009-10 chair of the NESCAC Presidents' Executive Committee
- Hamilton is on track to submit its Climate Action Plan to the American College & University Presidents Climate Commitment initiative by Nov. 15. The document outlines Hamilton's sustainability efforts. View draft plan: <http://www.hamilton.edu/Sustainability/HamiltonClimateActionPlan-Aug09.pdf>
- Since Nov. 2008, Hamilton's two solar systems and wind turbine have produced 36,347 kilowatt-hours, a reduction of 33,331 pounds of CO₂ (equivalent to 1,700 gallons of gasoline)

Alumni Association

- Julie Ross '84 assumed her role as President of the Alumni Association on July 1, 2009. She will serve a 3 year term through the College's Bicentennial in 2012.
- The Alumni Council, in tandem with campus planning committees, continues to work on planning for a grand celebration in 2012.
- Three Alumni Trustees began four year terms on July 1: Greg Robitaille '85, Jennifer Murphy Hill '87 and Thomas Tull '92.
- Regional Alumni Associations continue to plan a robust schedule of local events. Check out the Alumni page of the Web site for the latest information: www.hamilton.edu/alumni

Question and Answer

- *What's going to happen with the Bristol Campus Center once ELS is complete?*
 - The space won't begin changing until the Fall of 2010 and there's no shortage of demand to use the space, possible discussion has included changing into a student services building to house the Career Center, Health Center, and Cultural Education Center among others.

Annual Fund Update: Jon Hysell '72,P'04, director of annual giving

- **FY09 Look Back**
 - Achieved dollar goal of \$6 million (~\$8,000 over) and just shy of 53% participation goal at 52.4%
 - Surprisingly great year in light of the economic challenges
 - Thanks to volunteers and several key alumni challenges, including the Power of Many Challenge and Hamilton-Colgate Challenge
 - Rolled out of a new Online Honor Roll of Donors in September that replaces the printed annual fall register of gifts
 - <http://www.hamilton.edu/honorroll/>
 - Reduced costs (approximately \$40,000)
 - Better for the environment
 - Dynamic content now and moving forward
 - Instant stewardship opportunity
 - Happy to print copies of the Honor Roll for anyone who requests it

- **FY10 Goals**
 - FY10 goals for the Annual Fund are to achieve 53% participation and \$6 million. The dollar goal remains flat, recognizing that economic challenges will continue throughout the fiscal year.
 - **2009-10 Annual Fund runs from July 1, 2009 – June 30, 2010**

- **FY10 Tactics**
 - Lead solicitation from Beth and Greg Robitaille was mailed in September (everyone should have received it already)
 - **Class Agent Calling Period**
 - October 1 – December 1
 - **Alumni volunteers – please make your gift/pledge now**
 - It's easier to ask for support when you've already given.
 - Giving now also eliminates solicitations for the balance of the year (incentive for you and your calling assignments)
 - Student Phonathon is underway
 - New stewardship follow-up from student callers, hand-written notes after each conversation –good idea for alumni callers too
 - Special approach to GOLD and Reunion Classes
 - Cohorts respond differently – they are solicited differently
 - Class Gift Chairs will launch their message at the end of October
 - More solicitations will be delivered electronically this year: it's more efficient and prescriptive and cost effective
 - FY10 Online Honor Roll of Donors will become active in November
 - Donor names will be posted online in real-time
 - <http://www.hamilton.edu/honorroll/>
 - December Trustee Challenge
 - Power of Many Challenge Part II – one for one match from a Trustee pool for all December donors

Question and Answer

- *Relative to other institutions, how are Hamilton faculty compensated?*
 - According to a recent survey, Hamilton faculty and administrators are right in the middle of our peer school group.

- Last year, the President and her senior staff chose to freeze their compensation. Employees were given a \$500 increase (most years a performance based increase of between 1-4% is given)
- ***How do you respond from classmates pushing back about making a gift AND paying for Reunions?***
 - Alumni have been giving back at a rate 50%+ for the past 28 years, but alumni who attend Reunions, give back at a rate of 80%+.
 - Encourage your calling assignments to attend the reunion – coming back to the Hill will provide an opportunity for them to reconnect with the Hill and their College experience – and what an important role Hamilton played in their life.
 - Also important to note that the College subsidizes 50% of the cost of Reunions.
- ***What's the schedule for student Phonathons? Are my assignments also getting called by students?***
 - Student calling has begun and will continue through November.
 - If you selected assignments already, they will not be called by students.
 - If you have not selected assignments, do so as quickly as possible. Once selected, they will be removed from the student calling pool.
 - There are thousands of alumni who have yet to be called – so we're not "running out" any time soon.
- ***How often does the Annual Fund volunteer site get updated?***
 - Daily. Donor status updates are logged every night from the day before; it takes roughly 24 hours during the business week.
- ***What if, in off chance, one of my calling assignments has already been called by a student?***
 - Don't apologize, but ask them about their experience with the caller. Hamilton's Student Phonathon callers are the best in the business. They are well-trained, respectful and direct. Last year, over 3,000 donors gave because of a conversation they had with a student.
 - If they already gave – say thank you!
 - If they didn't give, ask why. And if they share feedback with you, please pass it along to the Alumni Office so we can improve our system. Tell them why you give and encourage them to consider participating before June 30.

Using your resources: Dave Steadman '03, associate director, annual giving

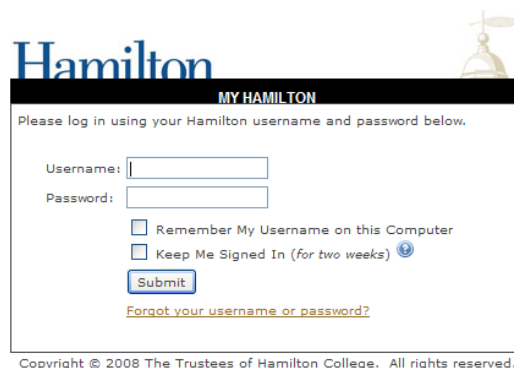
- **Your Class Manager: The Ultimate Resource**
 - At anytime you can call the Annual Giving Office at 866-729-0315 and ask to speak with your class volunteer manager. They will get you the information/materials that you need or point you in the right direction.
- Ample Web Resources
 - Begin at www.hamilton.edu/annualgiving/
 - **AF Volunteer site:** <http://www.hamilton.edu/afvolunteer>
 - **Volunteer support:** <http://www.hamilton.edu/annualgiving/vmat.html>
 - **Why give:** <http://www.hamilton.edu/annualgiving/annualfundfaq.html>
 - **Ways to give:** http://www.hamilton.edu/alumni/ways_to_give.html
 - **1812 Leadership Circle:** <http://www.hamilton.edu/1812/>
 - **GOLD Scholars:** <http://www.hamilton.edu/alumni/GOLDScholars/>

- **Reunions:** <https://www.hamilton.edu/reunions>
- **Phonathon:** <http://www.hamilton.edu/AnnualGiving/phoneathon.html>
- **AF Facts:** <http://www.hamilton.edu/AnnualGiving/facts.html>
- The Annual Fund Volunteer Web site
 - **AF Volunteer site:** <http://www.hamilton.edu/afvolunteer>
 - Choose your assignments, report your results, enter gift and pledge information and more!
 - **If you don't wish to use the Web site, we can always send you a printed packet for your calling, just let us know.**
- Other Annual Fund Volunteers
 - Work with your Class Gift Chairs and other class volunteers to share best practices

Annual Fund Volunteer Web site Training: Dave Steadman '03

Detailed instructions are available: <http://www.hamilton.edu/annualgiving/vmat.html>

- This training covered how to ...
 - View a class and class agent report
 - Choose your assignments to call
 - Report your calling results online
- **How to access the Volunteer Site:**
 - Go to <http://www.hamilton.edu/afvolunteer>
 - Log in using your Alumni Directory username and password
 - If you forgot your password or username go here:
<http://my.hamilton.edu/myhamilton/alumni/registration/forgottenpassword.html>



- The first thing you see at the top of the page is a Messages section, which is updated every few weeks, generally by the director of annual giving, and gives you latest perspective on the Annual Fund. Below that are the primary links in the Volunteer site.

- [View My Assignments](#)
- [Choose My Assignments](#)
- [View Class Agent Report](#)
- [View Results for All Classes](#)

- You can always find what you're looking for by coming back to the Volunteer site home page.

- **How to select calling assignments:**

- On the Volunteer Site home page, click “Choose My Assignments”
- In a moment a screen will load that displays all available members of your class to call, listed in alphabetical order.
 - This list has been vetted with our database and only includes classmates who haven’t made a gift this year. It also excludes anyone who has asked not to receive solicitations from the College.
- You can narrow down the list by using the “Select From Prospects” drop-down list near the top of the screen. Select from one of the following options:
 - With the same class year (this is the default)
 - With the same interests
 - That were assigned to me last year
- Make your selections by clicking the checkbox to the left of the person’s name you want to call; a check mark denotes an active selection

Choose My Assignments

Check the box in front of all the people you would like assigned to you. You can re-sort by any column by clicking on the column header. When complete, click the **Continue** button below. Selections can be made multiple pages prior to clicking Continue. If you would like to call people outside of your class, please call the Annual Fund office at 866-729-0315.

Select from prospects: with the same class year

Select	Class	Name	Spouse Name	Spouse Class	City	State	Country	Interests	Conser. Yrs Giving	Last Gift Date	Last Contact Result	Prior Agent
<input type="checkbox"/>	1972				Port Washington	NY						
<input type="checkbox"/>	1972				Orchard Park	NY						
<input type="checkbox"/>	1972				Shrewmond	WI						
<input type="checkbox"/>	1972				Hastings-on-H...	NY						
<input type="checkbox"/>	1972				Amherst	NY						
<input type="checkbox"/>	1972				Williamstown	NJ						
<input type="checkbox"/>	1972				Buffalo	NY						
<input type="checkbox"/>	1972				Harrisburg	PA						
<input type="checkbox"/>	1972				Fairport	NY						
<input type="checkbox"/>	1972			1974			Panama					
<input type="checkbox"/>	1972				New Hartford	NY						

- To view additional pages of available assignments, use the arrows at the bottom of the screen (e.g. page 3 of 20)
- When you have finished making your selections, click the “Continue” button at the bottom of the screen
- This will bring you to a confirmation screen. Please review your selections carefully. When your review is complete click “Confirm”
 - If you want to go back to correct or select more assignments just click the go back button in your browser. Your selection information will still be there.
- Once you click confirm, you’ll receive an e-mail confirmation from the director of annual giving of your selections shortly
- Start with a reasonable number of assignments. You can always go back for more!
- **How to view your assignment information and report results** (you can access this from the Volunteer home page or via link provided after you select your assignments).
 - Once you’re in this screen, you can check out the totals for Current Year Paid, Pledges Due and Last Year Paid for your assignments appear in the bottom left corner of the screen
 - This is a quick report card of how you’re doing so far.

's Assignments

Overall Class Results

Class Year	Prospects	Donors	Participation %	Goal	Needed	Annual Fund Total Pd	Restricted Total Pd	Total Pd
1972		4	0.0%	%		\$25,250.00	\$491.00	\$25,741.00

Click on a prospect's name to view calling information and report your results.

Find:

Name	Calling Agent	Ask Range	Current Yr Pd	Last Gift Date	Last Yr Pd	Pledge Due	Donor Status	Last Contact Result	Restricted Gifts
(h) [redacted] '72 (w) [redacted] More Info	[redacted]	\$1,000		07/20/2007	\$805.00		LYBUNT		Y
(h) [redacted] '70 (w) [redacted] More Info	[redacted]	\$5,000		06/30/2007	\$2,000.00		LYBUNT		N
(h) [redacted] '72 (w) [redacted] More Info	[redacted]	\$1,000		06/30/2007	\$514.00		LYBUNT		N
(h) [redacted] '73 (w) [redacted] More Info	[redacted]	\$1,000		06/28/2007	\$5,000.00		LYBUNT		N
(h) [redacted] '72 (w) [redacted] More Info	[redacted]	\$5,000		08/17/2007	\$7,500.00		LYBUNT		N

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[Export All to Excel](#)

Totals

Total Current Year Paid:	\$0.00
Total Pledges Due:	\$0.00
Total Last Year Paid:	\$30,939.00

- You can search for specific classmates using the “Find” box in the upper left corner of the screen (if you have more than 5 assignments)
 - In the text box, type in all or part of the first OR last name (not both) and click “Search”
 - To clear your selection and view the full list again, click “Clear”
- Click on the individual you wish to call. An online version of our calling form will appear containing all the contact information the College has and their giving history. Use this information to reach out to your classmate.
 - If there’s contact information missing, do some investigating. There are a number of Web resources, such as anywho.com and superpages.com. The best resource is a classmate who might know how to contact them.
 - Any contact information you find, please send along to the College using the text box provided on the report my results tab.

Calling Form

Prospect Information | **Report My Results**

Below is the information you need to make your call. When you are ready to report back to the Annual Fund office, click on the Report My Results tab above.

<p>Calling Agent:</p> <p>0368133 1972 Nickname:</p> <p>E-mail: Home Phone: Title: Employer: Business Phone: Matching Gift?</p> <p>Consecutive Years Annual Fund Support: 20</p>	<p>Mail Rules: AF Track Sources HamiltonG</p> <p>Spouse: Sp Class: Mail Rules: AF Track: Spouse Giving Pledged Paid Last Year This Year</p> <p>Children</p> <p>Vol. Roles:</p> <p>Major(s): Society: Undergrad Activities:</p>
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Last Gift Year	High Gift Year	High Gift Amount
2007	1994	\$2,500.00

Year	Annual Fund		Other Support	
	Gift	Matching Gift	Gift	Matching Gift
2006-07	\$805.00	\$0.00	\$405.50	\$0.00
2005-06	\$330.00	\$0.00	\$1,290.00	\$0.00
2004-05	\$300.00	\$0.00	\$100.00	\$0.00
2003-04	\$230.00	\$0.00	\$0.00	\$0.00
2002-03	\$500.00	\$0.00	\$150.00	\$0.00

Track History

Spouse Track History

- When you've completed your call, select the "Report My Results" tab at the top of your screen

Calling Form

Prospect Information Report My Results

Click one result and add comments when appropriate.

-- select --

Submit

- Using the drop down selection box, choose a result (e.g. "Gift by Credit Card")
- You can enter additional information about your results in the text box provided
 - Such as news, change in address or restriction information about the gift.
- Once you've completed your report, click the "Submit" button. A confirmation screen will appear saying "Your results were successfully reported" and will provide you with links back to the home page or to view your assignments.
 - You can go back and update your results after each attempt
- **Two reports that you can run from the Volunteer home page**
 - Report of all class agents in your class and their calling progress.
 - On the Volunteer Site home page, click "View Class Agent Report" link
 - In a moment a screen will load that displays all class agents in your class, and the status of their calls
 - To see a person's profile, click on their name
 - This is a great tool for Class Gift Chairs to support their Class Agents and for Class Agents to share best practices with other volunteers

Class Agent Report

Overall Class Results

Class Year	Prospects	Donors	Participation %	Goal	Needed	Annual Fund Total Pd	Restricted Total Pd	Total Pd
1972	184	5	2.7%	60%	105	\$3,425.00	\$886.00	\$4,311.00

Class Agents

Agent Name	Detail	Class Year	Total Prospects	Total Donors	Participation %
	[see detail]	1972	10	0	%
	[see detail]	1972	4	0	%

- Report of all classes and their up-to-date Annual Fund performance
 - On the Volunteer Site home page, click "View Results for All Classes"
 - In a moment a screen will load that displays all classes and their current giving totals as compared to last year
 - You can send this list to Excel for further review by clicking the "Export to Excel" link in the upper left corner of the screen

Overall Class Results

Updated on 09/29/09

[Export to Excel]

Class Year	Class Gift Chair	# in Class	Participation Goal	Needed for Goal	# Pldg/Pd This Yr	% Pldg... This Yr	\$ Pldg/Pd This Yr	# Paid This Yr	% Paid This Yr	\$ Paid This Yr	% Paid Last Yr	\$ Paid Last Yr
1935	Rathbun	7	100%	7	0	0%	\$0	0	0%	\$0	100%	\$5,525
1936		6	75%	5	2	33.3%	\$140	0	0%	\$0	100%	\$840
1937	Gray	6	90%	5	2	33.3%	\$600	0	0%	\$0	88.9%	\$1,200
1938	deCourcy	5	75%	1	3	60%	\$660	3	60%	\$660	75%	\$10,470
1939	Bate	12	80%	10	3	25%	\$500	0	0%	\$0	76.9%	\$1,220
1940	Ross	14	100%	13	4	28.6%	\$20,190	1	7.1%	\$100	100%	\$29,450
1941		9	60%	5	1	11.1%	\$50	0	0%	\$0	55.6%	\$1,610
1942	Pomilio	22	65%	13	4	18.2%	\$350	1	4.5%	\$50	69.6%	\$13,296
1943	Small	32	62%	19	6	18.8%	\$25,785	1	3.1%	\$125	57.6%	\$126,826
1944	Root	23	85%	18	6	26.1%	\$7,400	2	8.7%	\$1,750	87.5%	\$30,363
1945	Adams	33	100%	31	2	6.1%	\$2,000	2	6.1%	\$2,000	100%	\$60,867
1946	Kent	30	70%	19	3	10%	\$11,440	2	6.7%	\$11,340	75.8%	\$32,365
1947	Mussel...	9	65%	5	1	11.1%	\$100	1	11.1%	\$100	60%	\$5,976
1948	Horowitch	29	85%	24	5	17.2%	\$10,710	1	3.4%	\$10,000	84.4%	\$22,695
1949	Swarts	52	80%	39	9	17.3%	\$11,580	3	5.8%	\$730	80.4%	\$45,125

- **A few general Volunteer site tips**

- Most of the online reports use columns that can be re-sized to different widths as necessary. Simply put your cursor over the right edge of the column header (like you would when re-sizing a column in Excel) and drag it to the desired size.
- Most of the online reports can be re-sorted by clicking on a column header for the column you want to sort on. Each time you click a column header it will re-sort by ascending, then descending order.
- Some of the reports outlined above are too long to display on the screen and have pages that you can scroll through using the arrows at the bottom of the screen, or by using the scroll bar on the right side of the screen
- If you have problems or questions with the Volunteer Site, please feel free to call the Annual Fund office at 866-729-0315.