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Dear Alumni Volunteer,

First and foremost please accept my gratitude for volunteering for our alma mater. Your outreach makes it possible to keep Stevens alumni engaged in a meaningful way. Personally, I consider it a privilege to represent the University and I enjoy engaging with fellow alumni and sharing all that’s happening on campus.

Whether you are new to the role of an alumni volunteer or reading through this handbook as a refresher, I hope you will find the information helpful. The best advice I can impart for your phone calls, letters, and emails is to tell the story of why you support Stevens honestly and unapologetically. Today’s students – tomorrow’s leaders – are deserving of alumni support and our investment in them makes a difference.

Thank you for all you do to advance Stevens Institute of Technology.

Sincerely,

Ed Eichhorn ’69
Vice President for Development
YOUR ROLE AS A VOLUNTEER!

Being a volunteer for your class is a fun and rewarding way to connect with your classmates and to support your alma mater. You’ll have the opportunity to catch up with classmates you may not have spoken with since leaving campus and to encourage those friends to make an annual gift to Stevens.

As a Volunteer, You’ll:

- Act as an ambassador for the University in communications with classmates on a variety of topics.
- Write/review/edit correspondences (either by letter or via email) to your classmates asking them to give back to Stevens. The Annual Giving staff will help you by providing drafts and sending letters/emails on your behalf.
- Call your classmates to invite them to support Stevens Institute of Technology by making a gift.
- Attend Stevens events and try to get classmates to attend as well.

Personal contact from volunteers helps strengthen the bond alumni have with each other, the University, and the extended Stevens family. Such individualized, person-to-person connections are the foundation of our fundraising effort. Volunteers serve as ambassadors for Stevens Institute of Technology. By engaging classmates in a conversation about the value and importance of Stevens, volunteers help obtain classmates’ support for the University and address any hurdles that might keep their classmates from contributing.

Alumni Volunteer Responsibilities:

- Lead by example.
- Make a gift to Stevens before asking others to do the same.
- Serve as a representative of Stevens and The Office of Development to alumni.
- Act as a liaison between classmates and the University.
- Consult with the Director of Annual Giving and other staff on a regular basis to develop strategies to achieve yearly participation and dollar goals.
CONFIDENTIALITY POLICY

Purpose
To provide alumni volunteers with an understanding of the standards regarding dissemination and disposal of confidential information.

Guidelines
- Information provided to alumni volunteers throughout the years is considered strictly confidential.
- This information is to be used by volunteers solely in the performance of their duties as volunteer fundraisers for Stevens Institute of Technology.
- Information shared with volunteers should be done on a need-to-know basis.
- Information may not be transferred to any party outside the volunteer system without prior approval from The Office of Development.
- The information received is not to be used for any purpose other than that for which it has been provided.
- Proper disposal of confidential information includes shredding or returning information to The Office of Development.
- Alumni volunteers and other parties involved in fundraising are required to adhere to this policy.
WHAT ARE THE FIRST STEPS?

Give a gift that you feel good about. Making your gift early in the fiscal year may help you have a more meaningful experience as a volunteer and will make you more effective with your classmates. When you sit down and think about how you’d like to use your resources to make a difference in the lives of students and the future of Stevens, you are preparing to be a passionate spokesperson, ready to speak about why your classmates should give a gift. It is much easier to encourage someone to make a gift if you can say that they will be joining you in doing so.

Know why you gave your gift and be prepared to tell your classmates. The idea of asking someone for money can be intimidating. However, you make your gift and volunteer your time because you believe in Stevens Institute of Technology and what the University will use your contribution to accomplish. If you can share what it is that makes you excited about Stevens, then you are able to invite your classmates to discover the same satisfaction that you have found. When you express how you feel in knowing you participated in the good work being done at Stevens, your enthusiasm can be contagious and your classmates will be glad that you are giving them the same opportunity to make a difference.

Stay up-to-date on the University. When you speak to your classmates, they will be looking to you as a University insider who can fill them in on what’s happening. If you can share exciting information about the positive changes on campus, new programs and student successes, you’ll help your classmates feel proud of their alma mater. You can stay up to date by visiting the Stevens site at www.stevens.edu and clicking on the news link at the top of the page.
CASE FOR SUPPORT

Supporting Operating Expenses
The unrestricted support provided by The Stevens Fund provides flexible funds to meet immediate needs across campus, and supports the University’s highest priorities. The University depends on The Stevens Fund every year to provide available funding where it is needed most.

Every Gift Counts
Alumni participation plays an important role in academic rankings by national publications, signals alumni pride in Stevens, and sends a message throughout the academic world about the quality of our alumni and the degree of their accomplishment. Increasing our giving percentage, even with a small gift, helps Stevens rise in the ranks.

Establish a Tradition of Giving Back
There is a rich tradition of alumni support at Stevens that enables the University to offer current students the outstanding learning environment and opportunities from which they benefit. Your education was made possible by the contributions of the alumni who came before you, and in turn, your contributions help to ensure that Stevens is able to offer the same educational experience to today’s students. Your annual gift connects you with the thousands of alumni who have helped create and maintain the institution that has given us all so much.

People give to Stevens for all sorts of reasons. They give because they believe in our mission or because they received scholarships and want to pay that generosity forward. People give in memory of friends or loved ones and because of the fond memories they hold from their time on campus.
SOLICITING YOUR CLASSMATES

There is no single format for effective solicitation. However, the best calls and letters are generally brief and to the point. Some general hints include the following:

1. **You are not approaching strangers - you are approaching classmates.** Their interest in Stevens is as great as yours, and you are asking for support of one of the most marketable products in the world – education.

2. **Do not apologize for the solicitation.** If you did not believe in Stevens, you would not be doing the job with pride for your alma mater.

3. **Be clear on your goals for the year.**

4. **Challenge your classmates to increase their gifts to help the class reach its goal.** Many alumni give the same amount each year because of habit or because they have never been asked to give more.

5. **Understand the Stevens’ fundraising initiatives and what might appeal to your classmates.**

6. **Stress Giving Societies to raise your classmate's gift size.**

7. **Always ask for a specific amount.**

8. **Appeal to Stevens pride.**

9. **Promote Stevens and explain its needs.**

10. **Put yourself in your classmates' shoes.** What would you want someone to say to you if asking you for a gift?

11. **Support the project yourself.** It is much easier to ask classmates to give if you have already contributed yourself.
STRATEGIES FOR SOLICITATION

WRITING EFFECTIVE CLASS LETTERS

- **Make the case for giving to Stevens.** Why do you give? Evoke memories of campus life, share your own Stevens experiences, and incorporate items that elicit pride in the University.
- **Make your letters warm and personal.** Use humor or a light-hearted approach when appropriate - this can be effective in making the case for support and keep your classmates reading.
- Keep your letter to one page if possible.
- **Be positive.** Concentrate on the successes your class has experienced. If you feel your class is capable of doing more, mention it, but be sure to focus on the positive. Everyone likes to be associated with a successful cause.
- **Be appreciative.** Thank donors for gifts they have made in the past and for those you expect them to make in the future. Make them feel good about what their past support has meant to the University, and how much their future support means to the students at Stevens.
- **Clearly specify what action you want your classmates to take.** Don’t “hide” the message or make it seem like an afterthought. Don’t apologize for asking classmates to support the University.
- **Include an ask amount.** This gives classmates a specific level to consider.
- Tell your classmates how to give to the University and encourage classmates to set up automatic installment payments.
STRATEGIES FOR SOLICITATION (continued)

PHONE SOLICITATIONS

Connect – Create or re-establish the link you share with your classmate.

- Talk about Stevens today or the campus you remember.
- Listen to your classmate to pick up cues on how invested they are in the University and which direction the conversation should go.

Collect – When calling to make a specific ask for a gift to Stevens:

- Thank your classmate for previous gifts.
- Make the case for giving to Stevens.
- Be specific about the dollar amount for which you are asking.
- Provide information about the different giving options.

Follow Up – to ensure the greatest success, keep the following in mind:

- If you don't 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 Stevens and may require a follow-up call. Allow a reasonable amount of time to pass before you contact them again.
- Write notes, as appropriate, to thank them for taking the time to speak with you and for their commitment to the University.
STRATEGIES FOR SOLICITATION (continued)

PHONE SOLICITATIONS (continued)

Follow Up – to ensure the greatest success, keep the following in mind:

- Update your staff contact with gift, pledge, or refusal information. Also notify the Office of Development 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 Stevens this year. However, your positive attitude and endorsement of the University may result in a renewal of their relationship in the future.

- Share successes with other volunteers so that everyone can feel good and learn tips from each other.
STRATEGIES FOR SOLICITATION (continued)

EMAIL SOLICITATIONS

- Most emails are read within seconds. Try to make an immediate impact.
- The subject line should be attention-grabbing, but not misleading.
- 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 Stevens’ online giving page: www.stevens.edu/makeagift
- Include links to other pages on the University’s website. Fresh news is appreciated.
- Honor a classmate’s request not to be solicited by this method.
MAKING THE ASK

THINGS TO REMEMBER

**Be positive, upbeat and direct.** Do not apologize. If your classmate says he or she already knows all about the University, say that you would still appreciate a chance to tell why you believe his or her participation is important to the class effort.

**Be personal.** Explain why you give to Stevens and why the University is particularly important to you.

**Know the numbers.** You will want to be sure of your class fundraising goals and aware of gifts already raised by the committee. Ask for a specific gift amount. You may want to use language such as: “I pledged $___ to Stevens. Would you be willing to join me in giving a gift of $___?”

**Help your classmates find ways to make a gift.** Credit card gifts are great vehicles to close a donation immediately and are especially convenient for international alumni. Classmates can also make gifts of securities or other assets. You can suggest that the classmate spread their gift over time if he or she is considering a larger pledge.

**Mention the benefits of matching gifts.** If a classmate or their spouse works for a company with a matching gift program, ask him or her to send Stevens a matching gift form available from the company’s human resources office. Some companies even match gifts made by retired employees. Be sure to mention that a matching gift counts toward a person’s total gift. Determine if an employer is a matching gift company on the development website

**Know your classmates giving pattern.** Be familiar with the suggested “ask” for the classmate with whom you are speaking. Remember to thank them for their previous support. “I know you have supported the University in the past and we hope we can count on your continued support.” Be sure to stress that every gift counts and that participation is just as important as total money raised. Ask “Would you consider a gift of $___?”
MAKING THE ASK (continued)

THINGS TO REMEMBER (continued)

Address a classmate who has not supported the University in the past. Discuss donor participation. Stress that every gift counts, every donor is important, and that we are striving to achieve 100% class participation. Gifts at every level demonstrate the loyalty of alumni and influence University rankings.

Be honest and direct. If you are asked a question that you cannot answer, don’t try to guess. “I don’t know the answer to your question. However, let me follow up with the Office of Development and get back to you or have them contact you directly.”

Update contact information. Be sure to verify any and all contact information on file. If there are any blanks, try to fill them in. Focus special attention on business information and email addresses.

Listen. Do not expect an immediate commitment. Your classmate may need time to think it over or consult with their family.

End each call with an agreement about a specific next step. Mention that you will follow up on a specific day to continue the discussion if applicable. You may recommend that a member of Stevens’ development staff follows up with your classmate to close the gift.

AFTER THE PLEDGE OR GIFT IS MADE

Contact the Office of Development. Once you have confirmed a gift or pledge, please notify your staff contact so that a thank-you letter can be sent and the appropriate follow-up can be completed with your classmate. Be sure that you have captured the amount and the terms of the payment accurately. Pass along any questions or concerns your classmate has for follow up. The University also welcomes any address, phone, email, and employment updates you have for classmates. Your help in providing new contact information is critical.

Thank the donor. Acknowledge classmates personally. Write a thank you note to each classmate on your solicitation list when they make a gift or pledge. Be sure to include topics discussed during your call, if applicable. Although the University thanks donors, a personal note from you will mean a great deal to your classmates.
ADDRESSING HESITATION AND INDECISION

Despite your best efforts, you will likely encounter classmates who are hesitant to give and present logical reasons. Don’t be discouraged. Here we provide you with responses to the most common donor objections.

“I’m in grad school and paying tuition / I’m still paying student loans / I have kids in college”
“I certainly understand that you have a lot of financial responsibilities right now. We are hoping that you will help to raise our overall participation rate by giving at any level you feel comfortable. It is not important that all of our classmates give large amounts of money, but rather that everyone gives something. Will you join other alumni with a participation gift of $___?”

“I gave last year.”
“Thank you, your support means so much. Annual gifts are the core of Stevens as they help to support the continuing needs of undergraduate students each academic year. Would you continue your support with a gift of $___?”

“I support other Stevens programs…”
“That’s terrific. Thank you. I know the University appreciates your generosity. More than anything, we ask that you continue your support of Stevens. Several of us in the class have partnered with the Stevens Fund and/or our class scholarship on goals that specifically meet Stevens’ highest undergraduate priorities and financial aid. We hope you will consider showing your support for our efforts with a participatory gift at a level manageable for you. We are working to achieve ___ donors towards our class gift and we have ___ to go. Would a gift of $___ be comfortable for you?”

“I already give to another organization/College/University.”
“That’s wonderful that you support [organization name], and we certainly don’t want you to stop giving. At this time, Stevens also needs your support to continue meeting the increasing needs of our students.”

“I’m a graduate school alum and don’t feel affiliated with Stevens.”
“I’m sorry to hear that. Even though some graduate alumni may have studied at remote sites or online, Stevens considers every alumnus part of the Stevens family and your support does have a direct impact. You can even support a graduate fellowship or program with your donation.”
MAKING THE ASK (continued)

“I’m unemployed…”
“I’m sorry to hear that. I can certainly understand how this may affect your ability to give. Stevens offers alumni a wide variety of career services through the Office of Career Development. Their contact information is 201-216-5166, ocd@stevens.edu or www.stevens.edu/sit/ocd. The Stevens Alumni Association also offers many networking opportunities. The Alumni Association encourages you to contact them at 201-216-5763.

“I did not graduate.”
“The University considers every person who attended a member of the Stevens family. In fact, some of our most generous supporters only attended the University for a short amount of time. Would you be willing to show your support with a gift of $___?”

“Send me something…”
“I have your personal pledge card in front of me. I am asking classmates to specify a pledge commitment over the phone so that we can budget our resources accordingly. Is there a minimum pledge amount to which you can commit? Then, I can follow up with you in a few weeks to confirm your pledge. Of course, in the meantime, you can always give online at www.stevens.edu/makeagift.”

“I just… bought a house / got married / had a baby / retired / started a business…”
“That’s great! This must be a very exciting time for you and your family. Please know that the fact that you give is much more important than how much you give to Stevens. Every gift is important and helps to support the undergraduate experience of Stevens students. Will you participate by making a gift of just $___?”

“I already received something in the mail.”
“I’m glad you’ve received our mail piece. Making your pledge over the phone will allow Stevens to begin the budgeting process sooner than waiting for your reply in the mail. Can I could you for a gift of $___?”
MAKING THE ASK (continued)

REFUSALS

“I do not wish to be called.”
“I’m sorry for any inconvenience. We’ll make a note of this in the Stevens database. Can I take a moment to update your contact information while I have you on the phone?” [Verify name and address]. “We are also collecting email addresses so Stevens can keep you informed of news and upcoming alumni events. What is your email address?” [Verify email address].

“I already have Stevens in my will.”
“Thank you so much, it’s great to hear that you have Stevens in your future plans. While we deeply appreciate your generosity, I’m calling tonight about helping out with our current campaigns. It is not important that you give a large gift, but rather that you participate and give something. With that in mind, would you be willing to make a $___ gift to Stevens this year?”

“No / Never / I hate Stevens.”
“I’m so sorry to hear that. Would you care to share your reason? Maybe I can help by contacting a staff member to follow up with your concern.” Please do not argue with the prospect. Attempt to verify information on the call sheet.

SPECIAL CIRCUMSTANCES

The classmate is deceased. Express our sympathy. If possible, inquire about the date of death. Ask the name and relationship of the individual on the phone. Close with, “I will be sure to have him/her removed from our phone and mailing lists. Thank you very much. I am sorry to hear of your loss.”

Disabled / Ill / Nursing Home. “I’m very sorry to hear that. Is that [classmate name], who graduated from Stevens in [class year]? I will make a note of this, and we will take him/her off our solicitation list.”

Questions about the national Do Not Call list. “I understand your concern. While a lot of media attention has been paid to the “Do Not Call” list, they have not always highlighted that the list exempts callers who call on behalf of educational institutions. This means that Stevens, and in turn our efforts on their behalf, is exempt from this legislation.”
GIVING SOCIETIES

EDWIN A. STEVENS SOCIETY

Founded in 1974, the Edwin A. Stevens Society honors Edwin A. Stevens, who — with a generous contribution of land and funds bestowed upon his death in 1868 — established Stevens Institute of Technology. The Society recognizes alumni, parents and friends who have made significant investments in Stevens Institute of Technology’s mission of academic excellence and innovation by making leadership-level gifts annually to the University. These gifts enable Stevens Institute of Technology to respond to current priorities and opportunities and enhance its educational programs and resources. Edwin A. Stevens Society members collectively represent the most generous and committed supporters of Stevens.

HOW DO I BECOME A MEMBER?

To become a member of the Edwin A. Stevens Society, simply make a donation between July 1 and June 30 at one of the following levels to any area of the university:

- Benefactor: $25,000 +
- President's Circle: $10,000-$24,999
- Patron: $5,000-$9,999
- Member: $1,000-$4,499

ASSOCIATE MEMBERSHIP

The Edwin A. Stevens Society proudly offers Associate Membership to Graduates of the Last Decade (G.O.L.D.), parents, faculty and staff.

G.O.L.D.

In conjunction with the Graduates of the Last Decade (G.O.L.D.) program by making a $100 gift for each year since graduation, G.O.L.D. alumni can enjoy all the benefits of EAS Society membership.

Parents, Faculty and Staff

The EAS Society recognizes faculty, staff and parents of current students with their annual gift to Stevens of $500 and greater.
GIVING SOCIETIES (continued)

LEGACY SOCIETY

Launched in 1994, the Legacy Society recognizes and honors the many benefactors who have made enduring gifts by including Stevens Institute of Technology in their financial or estate plans. Stevens was actually founded with a significant bequest from Edwin A. Stevens, and it is therefore all the more fitting to recognize and celebrate the original foresight and support of the Stevens family through membership in the Legacy Society. Through gift planning, you help assure the University will accumulate and deploy the financial resources that enable us to operate and grow premier institution training and educating the next generations of technologists and problem-solvers who will address the world's complex problems. Membership in the Society involves no dues, obligations, nor solicitations, but does allow us to thank you and recognize you for the thoughtful plans you have made.

CRITERIA FOR MEMBERSHIP

When you establish a charitable gift annuity or a charitable remainder trust with Stevens, or notify us in writing that you have established a trust, bequest or other planned gift for the University, you immediately become eligible for membership in the Legacy Society. Your planned gift may be for any amount, and your gift may either be unrestricted or designated for a specific program.

WAYS TO MAKE YOUR GIFT

Membership in the Legacy Society is open to those who have made long-range commitments to Stevens Institute of Technology. There are many ways to incorporate Stevens into your financial and estate planning:

- A bequest by will or living trust, through which you can make an impact on future generations
- The gift of a life insurance policy, whether a policy no longer needed for its original purpose or a new policy enabling a substantial future gift at a very modest annual cost
WAYS TO MAKE YOUR GIFT (continued)

- A gift of retirement plan assets which would otherwise be subject to potential 'double taxation,' limiting their value to your heirs
- A Charitable Gift Annuity, providing lifetime income to you (or whomever you choose) as well as income and estate tax savings
- A Charitable Remainder Trust, providing lifetime income for you (or whomever you choose), income and estate tax savings, and the avoidance of capital gains taxes on highly appreciated property
- A Charitable Lead Trust, an intergenerational wealth-transfer tool that enables you to both provide for your heirs and give to Stevens – while also sharply reducing gift and estate taxes.

CONTACT INFORMATION
For answers to your estate and gift planning questions, please contact Michael Governor, Director of Planned Giving, at (201) 216-8967 or michael.governor@stevens.edu.
GIVING SOCIETIES (continued)

LIFETIME GIVING SOCIETY

Stevens’ Lifetime Giving Society is established to recognize generous benefactors to the University whose total outright gifts exceed $100,000. These donors have ensured the success of the University through their support. The society enables us to recognize the passion for Stevens these donors possess and motivate other like-minded individuals to join their ranks.

CRITERIA FOR MEMBERSHIP

Membership in Stevens Lifetime Giving Society will be granted once a donor’s outright commitments to Stevens exceed $100,000. Gifts of cash, stock and other gifts in-kind; pledges; and life income gifts managed by Stevens are credited at the full fair market value. Couples will be recognized when their joint philanthropy reaches thresholds within as well. Donors will progress through the levels when additional thresholds are met.

1870 SOCIETY

The 1870 Society is part of a new found tradition started by students that invites current undergraduates to actively invest in the future of Stevens Institute of Technology by contributing $18.70 for initiatives that enrich the University. The 1870 Society helps fund institutional upgrades that foster changes for students, as well as a medium for undergraduates to place their input on changes and/or upgrades they want to see on campus. 1870 Society members consider their annual gifts to be votes of confidence in the University and its future. Annual gifts made by students will go to work immediately, helping improve aspects of Stevens most important to undergraduates.
FUNDRAISING INITIATIVES

PRESIDENT'S INITIATIVE FOR EXCELLENCE

The President’s Initiative for Excellence is a three-year, $30 million fundraising effort aimed at improving the student experience by expanding scholarship programs, upgrading infrastructure, enhancing the university’s technical capabilities and boosting the university’s ability to attract outstanding new faculty members. The Initiative is the first installment of a long-term strategic planning exercise that focuses on excellence in all facets of Stevens life, from academics to applied research to entrepreneurial enterprises and the meaningful engagement of students and faculty in solving the world’s most urgent challenges through technological innovation. It marks the launch of the Stevens Decade - a period of serious planning, bold ambitions, and impressive accomplishment - leading up to the University’s landmark 150th anniversary. With the vital input and enthusiastic participation of the Stevens community, the Initiative is on course to not only meet but also surpass expectations.

SCHOLARSHIPS TO RETAIN TALENTED STUDENTS IN NEED

Stevens will expand efforts to recruit and retain the brightest and most enterprising students, while supporting their educational journeys from freshman year through graduation. As the cost of a first-rate technical education rises, financial aid becomes an increasingly critical priority. Attracting top scholars is key to Stevens’ mission of producing a highly skilled, technology-savvy work force capable of devising innovative solutions to address complex societal problems.

How to participate:

- Endowed scholarships and annual fund gifts will support students in specific areas of study. The minimum required pledge for establishing a named endowed scholarship is $75,000. Additionally, it is possible to create a named term scholarship by donating a minimum amount of $10,000 per year for four years.

- The Adopt-a-Student program requires a four-year commitment of $25,000 per year. This program links a donor with a student - the recipient of the scholarship - from the time the student joins Stevens until graduation.
PRESIDENT'S INITIATIVE FOR EXCELLENCE (continued)

How to participate:

- The Keep Me Stevens Program supports students with strong academic records who have completed 60 credit hours or more and are experiencing financial difficulties that may force them to either leave school or become part-time students. Keep Me Stevens requires a minimum commitment of $10,000 per year.

SUPPORT FOR FACULTY

The Initiative will allow Stevens to recruit and retain outstanding faculty - the core of an institution of higher learning - and equip them with the resources they need to provide an exceptional learning experience for students, advance the frontiers of science and technology through research, and transfer game-changing technologies to the world beyond our walls. Our students collaborate closely with prominent researchers in classrooms and laboratories as an integral part of the Stevens experience. Initiative funds give the university the flexibility to add internationally renowned faculty and researchers to our academic programs as important new fields of study arise.

How to participate:

- Gifts of endowed chairs allow Stevens to secure top talent in vital fields of study. The cost to endow and name a full professor’s chair is $2 million, funded over a three-year period. The cost to endow and name a distinguished professor’s chair is $3 million, funded over a three-year period.

- Term chairs and professorships provide support for research or specific educational programs. Naming opportunities begin at $50,000 per year, funded for a minimum of three years each.
PRESIDENT'S INITIATIVE FOR EXCELLENCE (continued)

STATE-OF-THE-ART INFRASTRUCTURE FOR A LEADING TECHNOLOGY UNIVERSITY

The Initiative will provide needed funds to upgrade the university’s physical infrastructure, modernize facilities and expand technical skills in order to maintain a cutting-edge learning environment on campus, while preparing Stevens graduates to step into careers that will require mastery of state-of-the-art technologies.

How to participate:

- Designate gifts that allow the University to renovate classrooms, lecture halls and laboratories, and equip these spaces with state-of-the-art technologies.

- Designate gifts that provide needed resources to enhance and expand common facilities such as the library, athletic facilities and the information technology infrastructure.

- Designated gifts that contribute to ongoing beautification efforts campus-wide, allowing the university to, for example - plant trees and flowers and add artwork, while also maintaining Castle Point’s singular history and beauty.
THE PRESIDENT'S DISTINGUISHED LECTURE SERIES

In addition to strengthening the academic program and expanding opportunities for students, the Initiative will support a high-profile lecture series focused on important topics in science and technology, the linkages between societal issues and advances in science and technology, and related policy issues. The lecture series is designed to keep Stevens front and center in academic and policy discussions critical to the nation, on topics such as green energy, advanced biomedical devices, cyber security, health information technology, next-generation wireless systems and social media technologies.

Guest speakers will include highly distinguished engineers, scientists, policy makers and corporate executives. The series will both generate excitement within the Stevens community and attract wider audiences in academia, media, Wall Street and beyond.

IMPACT

With your support over the next three years, The President’s Initiative for Excellence will strengthen fundamental aspects of the Stevens experience in profound ways. We will help talented students afford the high cost of a first-class technical education by expanding our scholarship programs. We will further engage our students in the challenges of today, while reinforcing the university’s role as a center for innovative solutions, through the President’s Distinguished Lecture Series.

At the same time, we will seek new opportunities both on and off campus to build meaningful and effective partnerships with corporate communities to immerse our students in real-world problems and enhance our research enterprise. We will make strategic upgrades in campus facilities, building upon our state-of-the-art research laboratories such as a “clean room” which houses nano- and micro-device research equipment. And we will continue to recruit outstanding scholars so that our future graduates - like so many distinguished Stevens alumni before them - leave Castle Point ready to provide thoughtful, impactful solutions to the world’s most complex challenges and problems.
PRESIDENT'S INITIATIVE FOR EXCELLENCE (continued)

THE PRESIDENT'S DISTINGUISHED LECTURE SERIES

RECOGNITION

The generous sponsors of these vital programs will be recognized in a variety of ways for their important roles in advancing The President’s Initiative for Excellence, such as through Stevens publications, the university’s web site, and an annual scholarship luncheon held in their honor and hosted by Stevens President Naramin Farvardin.
FUNDRAISING INITIATIVES (continued)

THE CHAIRMAN’S CHALLENGE

To help increase alumni participation, Dr. Lawrence T. Babbio ’66, Chairman of the Stevens Institute of Technology Board of Trustees, has issued The Chairman’s Challenge, a $1 million matching gift opportunity to foster increased alumni support to the University.

The Chairman’s Challenge is a call for all Stevens alumni to channel their pride for the University into action. Alumni may decide to give to a specific scholarship, faculty research area, favorite student club, or the Stevens Fund, which provides unrestricted support to the University’s highest priorities. Whichever designation chosen, every gift has an immediate impact upon the lives of Stevens students now and for decades to come.

ELIGIBLE CONSTITUENCIES
- Undergraduate alumni who have never made a gift to the University are eligible to be matched at a 1:1 ratio.
- Undergraduate alumni whose last contribution was before July 1, 2010 are eligible to be matched at a 1:1 ratio.
- All Graduate alumni are eligible to be matched at a 1:1 ratio.

MATCH REQUIREMENTS
- New gifts and pledges of $100 or more up to $10,000 per donor made to any fund, school, or program are eligible.
- The $10,000 limit is per-donor, per fiscal year, not per-gift, a donor can make as many gifts as they like within the fiscal year.
- Corporate matches will not be eligible for the program. Donors must meet the minimum donation requirement with their own gift or pledge.
FUNDRAISING INITIATIVES (continued)

THE CHAIRMAN’S CHALLENGE (continued)

G.O.L.D. RUSH

In order to encourage recent Stevens Institute of Technology undergraduates to invest in their alma mater, Dr. Lawrence T. Babbio ’63, a member of the Board of Trustees, will match all gifts of $50 or more made by members of the classes of 2003 through 2012. During two periods throughout the fiscal year, the match will be increased to 2:1, to further spur alumni giving. The challenge match will focus on not only raising funds but also increasing the participation rate amongst young alumni.
THE STEVENS FUND

Definition and Purpose

- The Stevens Fund is the vehicle through which alumni, parents, and friends make gifts on an annual basis toward supporting the costs of programs at Stevens Institute of Technology.

- The Stevens Fund is the single most important source of annual renewable unrestricted gift income available to the University.

- Revenue raised through the Stevens Fund is used to offset the annual operating expenses of the University, as well as, for special projects and priorities across campus.

- Frequently, classes choose to support a specific project -- a renovation or other campus improvement. The Office of Development can provide class leaders with University projects currently in need of support.

From Where Does the Money Come?
Gifts to the Stevens Fund come from numerous supporters. Both undergraduate and graduate alumni, individuals, and parents contribute substantially to the University annually.

How Do We Raise the Money?
The Stevens Fund relies heavily upon the help of our alumni volunteers for the solicitation of funds. Volunteers make annual contacts to fellow classmates on behalf of the Fund.

Beyond these personal contacts, several annual programs have been established by the Office of Development. Direct mail is sent to alumni and friends three to five times each year. Also, two major telethons are held annually where students and alumni volunteers are able to contact a majority of our alumni body on behalf of the Stevens Fund.
FUNDRAISING INITIATIVES (continued)

VARIOUS S CLUB

The Stevens athletics programs are growing rapidly, with 11 new varsity teams added over the last decade. Approximately 500 student-athletes on 26 teams now proudly wear the University colors in varsity competition.

Gifts to the Varsity S Club directly support our 26 varsity athletic teams and 18 club sports, as well as the intramural and wellness programs and athletic facilities. In 2011, the club’s contributions helped fund an interactive display for the Stevens Athletics Hall of Fame, a new outdoor sound system for the DeBaun Athletic Complex, team championship banners in the Canavan Arena, and a swimming record board in the DeBaun Aquatics Center.

You become a member of the Varsity S Club with a gift of any size, though gifts at higher levels yield special benefits:

- **Red Level - $250 - $499 Annual Contribution**
  Free admission to all home athletic events

- **Grey Level - $500 - $999 Annual Contribution**
  Free admission to all home athletics events
  Invitation to special members-only Varsity S Club receptions

- **Varsity Level - $1,000 + Annual Contribution**
  Free admission to all home athletics events
  Invitation to special members-only Varsity S Club receptions
  Membership in the Edwin A. Stevens Society
FUNDRAISING INITIATIVES (continued)

SUPPORT STEVENS SCHOLARSHIPS

Providing financial aid through scholarships is a core commitment at Stevens. The ability to increase the financial aid packages we offer to students and their families is thanks largely to the generosity of our alumni and friends, who graciously fund endowed and term scholarships each year. However, scholarships account for just over 3% of financial aid to needy undergraduate students – a much lower percentage than at comparable technological universities. With alumni support, we can achieve our goal and commitment to growing the demonstrated financial need of every admitted undergraduate student.

Term
A gift at any level can be put to immediate use through a term scholarship fund. Gifts to these funds have a tremendous impact on current students, as they provide a scholarship in the full amount of the donation being made. Term Funds are administered within the fiscal year of the gift or another specified timeframe.

Endowed
Endowed Scholarships can be established with a minimum gift of $50,000 and scholarship awards are made from the fund’s earnings in subsequent years. The principal balance remains intact and the fund lives in perpetuity. Endowed gifts can also be established over time. With a minimum gift of $25,000 and a pledge to build the fund to $50,000 within 3 years, donors can name an endowed fund.

Endowed funds can be named for the donor or their family, created to memorialize a class and also established through estate gifts.
WAYS OF GIVING

Check or Money Order
Your check should be made payable to Stevens Institute of Technology. Mail checks to the following address:

Stevens Institute of Technology
The Office of Development
1 Castle Point on Hudson
Hoboken, NJ 07030
(201) 216-5241
Fax (201) 216-8247

Credit Card
A credit card gift to Stevens is not only convenient; it also entitles you to the same income-tax deduction as a gift of cash. To make your credit card gift please visit stevens.edu/makeagift or call us at 201-216-5241

Pledge
You can pledge your support by extending the process of payment for your fiscal year contribution, over the course of several payments. An extended payment plan might be for you if you would like to make a larger contribution.

Gifts of Stock/Securities
Making a gift of appreciated securities or stock to Stevens Institute of Technology is both a wonderfully generous gesture and a tax-efficient method of supporting the University. In most instances, you can receive a tax deduction for the full market value of your gift and avoid capital gains taxes. For more information on gifts of stock, please visit www.stevens.edu/dev/stockgifts.

Planned Gifts
You can make a gift that leaves a lasting personal legacy of support at Stevens Institute of Technology. These types of charitable arrangements allow you to support Stevens long into the future, while also providing considerable tax benefits in the present. For more information on gift planning please visit stevens.edu/dev/plannedgiving
FAQ

Why is my gift important?
Your contribution to the Stevens Institute of Technology is a vote of confidence in the University’s commitment to excellence. It enables the school to meet the immediate needs of the students in a variety of ways.

I can only make a small contribution. Does it really help?
YES! All gifts are important to the ongoing success of the University. When corporations or foundations consider Stevens as a giving option, they often ask about participation in giving. High rates of participation show a commitment from our alumni and increase the chances of a gift from foundations and government agencies.

How can my gift be matched to increase its value?
By searching Stevens’ matching gifts database, you may find that you can double or even triple your gift if you (or your spouse or partner) work for a matching gifts employer.

To find out if your company has a matching gift policy, please visit our dedicated matching gift page at www.stevens.edu/dev/matching.

Can I make a gift online?
Certainly. You can make your gift at www.stevens.edu/makeagift.

What does my gift support?
Gifts to the Stevens can make a real difference in the lives of the next generation of students. Your contribution can provide crucial support for student services and enhancements to facilities and technology, as well as helping the University provide an exceptional academic experience.

How can I fulfill my gift?
Stevens Institute of Technology accepts VISA, MasterCard, Discover, and American Express, checks, money orders and gifts of stock. If your employer has a matching gifts program, you can double or even triple your gift! Search Stevens’ matching gifts database to find out if you or your spouse or partner work for a matching gifts employer at www.stevens.edu/dev/matching. Special billing options such as monthly or quarterly payments are also available. To discuss special billing options, please call 201-216-5241 or e-mail the development@stevens.edu
FAQ (continued)

When is the fiscal year?
The Stevens Institute of Technology’s fiscal year begins on July 1st and ends on June 30th.

Are gifts tax-deductible?
All gifts to Stevens Institute of Technology are tax-deductible to the extent permitted by law.

Is it possible to give stock to Stevens?
Yes. Contributing appreciated securities is a great way to give to Stevens Institute of Technology. For more information about making a gift of stock, call 201-216-5241 or email development@stevens.edu

Why is alumni participation so important?
The alumni participation rate is the percentage of alumni giving a gift to Stevens Institute of Technology versus total alumni. The percentage of alumni who support the Stevens is a benchmark indicator of alumni satisfaction in rankings like U.S. News & World Report. When corporations or foundations consider giving to Stevens Institute of Technology, they often ask about participation in giving. A high participation rate of alumni giving shows a commitment from those who are close to the school. Corporations and foundations are encouraged when those close to the college show a vote of confidence by making annual gifts. By giving to the Stevens and helping to increase alumni participation, you increase Stevens’ ranking and increase the value of your degree. As Stevens Institute of Technology gains esteem as a leading University of engineering, business and technology, so do its alumni.

What is Stevens Institute of Technology’s tax ID number?
Stevens Institute of Technology’s tax ID number is 22-1487354.
GLOSSARY

1870 Society: a new, student-founded giving society that invites current students to actively invest in the future of Stevens by giving a gift of $18.70 for opportunities to enrich the University.

Alumni Participation: a measure, usually expressed in percentages, of how many contactable alumni who have made gifts to Stevens.

Annual Gifts: gifts generally expended during the year in which they are received.

Associate EAS: the Edwin A. Stevens Society offers Associate Membership to Graduates of the Last Decade (G.O.L.D.), parents, faculty and staff. By making a $100 gift for each year since graduation, G.O.L.D. alumni can enjoy all the benefits of EAS Society membership. Parents, faculty, and staff become members with an annual gift to Stevens of $500 or greater.

Bequest: a bequest is a transfer of cash, securities, or other property through a will or a living trust. A bequest to Stevens can be made for a specific amount, for a percentage of your estate, or even for all or a portion of what is left after you have made specific bequests to your family and others.

Business Reply Envelope (BRE): a self-addressed envelope whose postage is paid for by the organization that prints it.

Calendar Year: the period between January 1 and December 31. Some donors choose to give toward the end of the calendar year for tax purposes.

Campaign: a fundraising initiative in which staff and/or volunteers solicit donations in a variety of ways, including face-to-face, by email and direct mail, in an effort to raise money for the University.

Capital Campaign: an organized, intensive fundraising effort on the part of the University to secure extraordinary gifts and pledges for a specific purpose during a specified period of time.

Capital Gifts: gifts generally made to support special long-term projects such as the construction or major renovation of buildings, the creation of new programs (e.g. an academic department) or the endowment.
GLOSSARY (continued)

Chairman’s Challenge: to help increase alumni participation, Dr. Lawrence T. Babbio ’66, Chairman of the Stevens Institute of Technology Board of Trustees, has issued The Chairman’s Challenge, a $1 million matching gift opportunity to foster increased alumni support to the University.

Charitable Gift Annuity: sometimes referred to as a CGA, a Charitable Gift Annuity is a simple agreement between you and Stevens Institute of Technology. There are only two rules: You may establish a Charitable Gift Annuity with a minimum gift of $10,000, and the annuitant must be at least 65 years of age when the annuity payments begin.

Charitable Remainder Trusts: there are two types of Charitable Remainder Trusts—a Charitable Remainder Annuity Trust, which pays the income beneficiary a fixed income each year, and a Charitable Remainder Unitrust, which pays a variable income over the life of the trust. The type of trust you choose depends upon your goals and objectives.

Class Scholarship: scholarship dedicated to and raised by members of a graduating class year to be used to assist select students with tuition costs.

Deferred Gift: a gift that is committed to the University but is not available for use until some future time, usually the death of the donor.

Donor: an alumnus/a or friend who has made a gift to Stevens Institute of Technology.

Edwin A. Stevens Society: founded in 1974, the Edwin A. Stevens Society honors Edwin A. Stevens, who — with a generous contribution of land and funds bestowed upon his death in 1868 — established Stevens Institute of Technology. The Society recognizes alumni, parents and friends who have made significant investments in Stevens Institute of Technology’s mission of academic excellence and innovation by making leadership-level gifts annually to the University.

Endowment: funds that are invested by the University to support long-term initiatives or projects such as scholarships, professorships, and programs. The University relies on endowment income, not the principal itself, for financial support.
GLOSSARY (continued)

**Endowed Chair:** an endowed chair is a faculty position supported by an endowment fund established for that specific purpose. The income from that endowment provides financial support for teaching, research and service in a specified academic field. Endowed chairs lend prestige to the individual faculty member holding the chair, to the specific department or program, and to the institution in general.

**Endowed Scholarships:** funds that are designated in perpetuity for students needing financial assistance. Donors may create a scholarship in their name or in honor of someone else.

**Fiscal Year (FY):** the period between July 1 and June 30. The University uses this time frame for the solicitation and recording of gifts. Donors who make gifts during this period are listed in annual Record of Philanthropy, posted online every fall.

**Gift:** a voluntary, unconditional transfer of an asset.

**Gift-In-Kind:** non-monetary items of tangible personal property such as art, collectibles, books, equipment, and other physical assets or materials which have value that are gifted to the University.

**Gift of Securities/Stock Gift:** giving a gift of publicly traded stock or securities that has increased in value and that you have owned for more than one year may provide greater tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock or securities.

**G.O.L.D.:** or Graduates of the Last Decade, is a program that strives to help young alumni making up the last 10 graduation classes stay connected with their alma mater through a variety of programs and events.

**Honorary Gift:** a gift given in honor of a loved one, a friend, or in celebration of a special occasion.

**Lapsed Donor:** an alumnus/a or friend who had made a gift to Stevens Institute of Technology during a previous fiscal year but not in the current or immediate past fiscal year.
GLOSSARY (continued)

**Legacy Society:** launched in 1994, the Legacy Society recognizes and honors the many benefactors who have made enduring gifts by including Stevens Institute of Technology in their financial or estate plans.

**Life Income Gift:** planned gifts such as Charitable Gift Annuities and Charitable Remainder Trusts that will benefit Stevens in the future while providing tax benefits and income for the donor (or another person they designate) immediately and over time.

**Lybunt:** a name describing donors who contributed during the last fiscal year, but not yet during the current fiscal year (last year but unfortunately not yet this year).

**Major Gift:** a gift of significant amount ($10,000 or more) often given for a specific purpose.

**Matching Gifts:** many companies match the amount of an individual’s gift and occasionally that of the donor’s spouse/partner at some level. Matching gifts forms are available from a company’s human resources department. See www.stevens.edu/dev/matching for more information.

**Memorial Gift:** a gift to Stevens Institute of Technology commemorating someone who has died, as designated by the donor. Upon request, the University will notify the appropriate family members of memorial gifts.

**Never-Giver:** an alumni who has not contributed to the University.

**Planned Giving:** sometimes referred to as gift planning, a planned gift is any major gift, made in lifetime or at death as part of a donor’s overall financial and/or estate planning. Three types of planned gifts include: 1. outright gifts that use appreciated assets as a substitute for cash; 2. gifts that return income or other financial benefits to the donor in return for the contribution; 3. gifts payable upon the donor’s death.

**Pledge:** a multi-year commitment to contribute annually toward a specified fund.

**President’s Initiative for Excellence:** a three-year, $30 million fundraising effort aimed at improving the student experience by expanding scholarship programs, upgrading infrastructure, enhancing the university’s technical capabilities and boosting the university’s ability to attract outstanding new faculty members.
GLOSSARY (continued)

**Restricted Gifts:** also known as “designated gifts,” these are targeted to a specific purpose (e.g., an academic program or sport).

**Senior Class Gift:** a legacy contribution made by the graduating senior class through funds raised in a campaign starting from their final year at Stevens through the end of their first year as alumni.

**Stevens Fund:** a campaign that strives to raise unrestricted gifts. Unrestricted money is utilized to benefit student financial aid, technological improvements, excellent faculty and many other University needs.

**Stevens Scholarship Fund:**

**Stewardship:** a process of recognition that continues to convey Stevens appreciation to donors for their thoughtful commitments.

**Sybunt:** an acronym that stands for an individual who made a gift two years ago but not this year or last year: Some Year But Unfortunately Not This.

**Telethon:** the University’s telemarketing program that utilizes student callers and supports the Stevens Fund and, ultimately, all the University’s programs.

**Term Scholarship:** A gift at any level can be put to immediate use through a term scholarship fund. It is similar to the Stevens Scholarship Fund in that these gifts are for immediate use. Gifts to these funds have a tremendous impact on current students, as they provide a scholarship in the full amount of the donation being made.

**Unrestricted Gifts:** gifts that donors allow to be used for the University’s highest priorities, as opposed to gifts designated to specific areas. Gifts to The Stevens Fund are unrestricted.
RESOURCES

The Office of Development
1 Castle Point on Hudson
Hoboken, NJ 07030
(201) 216-5241
Fax (201) 216-8247
development@stevens.edu
www.stevens.edu/dev

The Alumni Association
1 Castle Point on Hudson
Hoboken, NJ 07030
201-216-5163
alumni@stevens.edu
www.stevens.edu/alumni

The Office of Career Development
P: 201-216-5166
E: ocd@stevens.edu
www.stevens.edu/sit/ocd

Gifts of Stock www.stevens.edu/dev/stockgifts
Make a Gift www.stevens.edu/makeagift
Matching Gifts www.stevens.edu/dev/matching
Planned Giving www.stevens.edu/dev/plannedgiving
Stevens News www.stevens.edu/news
Ways to Give www.stevens.edu/dev/waystogive
## 2012-2013 Volunteer Calendar

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2012</td>
<td>Beginning of the fiscal year</td>
</tr>
<tr>
<td>September 2012</td>
<td>Volunteer Summit</td>
</tr>
<tr>
<td>September 2012</td>
<td>Direct mail letter to all undergraduate alumni</td>
</tr>
<tr>
<td>October 2012</td>
<td>Telethon Begins</td>
</tr>
<tr>
<td>October 2012</td>
<td>Captains Report distributed to volunteers</td>
</tr>
<tr>
<td>October 2012</td>
<td>Email solicitation to all undergraduate and graduate alumni who have not yet made a gift in fiscal year 2013</td>
</tr>
<tr>
<td>November 2012</td>
<td>Volunteer Newsletter distributed</td>
</tr>
<tr>
<td>November 2012</td>
<td>Captains Report distributed to volunteers</td>
</tr>
<tr>
<td>November 2012</td>
<td>Direct mail end-of-calendar-year solicitation to all undergraduate and graduate alumni</td>
</tr>
<tr>
<td>December 2012</td>
<td>Captains Report distributed to volunteers</td>
</tr>
<tr>
<td>December 2012</td>
<td>Alumni Volunteer letters due to staff</td>
</tr>
<tr>
<td>December 2012</td>
<td>Email sent to all undergraduate and graduate alumni who have not yet made a gift in fiscal year 2013</td>
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<tr>
<td>December 2012</td>
<td>Alumni Volunteer letters mailed</td>
</tr>
<tr>
<td>December 2012</td>
<td>Email sent to all undergraduate and graduate alumni as a last chance to give before the end of the 2012 tax year</td>
</tr>
<tr>
<td>January 2013</td>
<td>Captains Report distributed to volunteers</td>
</tr>
<tr>
<td>January 2013</td>
<td>Volunteer Newsletter Distributed</td>
</tr>
<tr>
<td>February 2013</td>
<td>Captains Report distributed to volunteers</td>
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<td>Direct mail letter to all undergraduate alumni</td>
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<td>May 2013</td>
<td>Captains Report distributed to volunteers</td>
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<tr>
<td>May 2013</td>
<td>Direct mail solicitation to all undergraduate alumni</td>
</tr>
<tr>
<td>June 1 - June 30, 2013</td>
<td>Phone solicitations from alumni volunteers asking alumni to contribute</td>
</tr>
<tr>
<td>June 2013</td>
<td>Captains Report distributed to volunteers</td>
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</table>
WE’RE HERE TO HELP!

The Office of Development staff is here to help with your fundraising endeavors in any way they can. Please contact the Office of Development staff when you have a question or need assistance.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edward C. Eichhorn ’69</td>
<td>Vice President for Development</td>
<td><a href="mailto:edward.eichhorn@stevens.edu">edward.eichhorn@stevens.edu</a></td>
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<td>201-216-5682</td>
</tr>
<tr>
<td>Gilian Brannan</td>
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<td>201-216-5243</td>
</tr>
<tr>
<td>Michael Governor</td>
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<td>201-216-8967</td>
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<tr>
<td>Zef Ferreira ’00</td>
<td>Director of Special Projects</td>
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<td>201-216-5247</td>
</tr>
<tr>
<td>Michelle Schleibaum</td>
<td>Associate Director of Development for Athletics</td>
<td><a href="mailto:michelle.schleibaum@stevens.edu">michelle.schleibaum@stevens.edu</a></td>
<td>201-216-5495</td>
</tr>
<tr>
<td>Michael Trapani ’08</td>
<td>Assistant Director of Annual Giving</td>
<td><a href="mailto:michael.trapani@stevens.edu">michael.trapani@stevens.edu</a></td>
<td>201-216-3329</td>
</tr>
<tr>
<td>Claudette Williams</td>
<td>Manager, Annual Giving</td>
<td><a href="mailto:claudette.williams@stevens.edu">claudette.williams@stevens.edu</a></td>
<td>201-216-5149</td>
</tr>
<tr>
<td>The Office of Development</td>
<td></td>
<td><a href="mailto:development@stevens.edu">development@stevens.edu</a></td>
<td></td>
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The Office of Development
1 Castle Point on Hudson
Hoboken, NJ 07030
(201) 216-5241
Fax (201) 216-8247
development@stevens.edu
www.stevens.edu/dev
G.O.L.D.
GRADUATES OF THE LAST DECADE
Dear Alumni Volunteer,

I’d like to thank you for volunteering your time today to learn more about alumni outreach and how your efforts can help engage your fellow classmates. With your assistance, we are one step closer to reaching our fundraising goals for the 2013 fiscal year.

In 2012, G.O.L.D. raised $52,000, surpassing the $30,000 raised in 2011. Not only do we plan on beating this new financial benchmark, we also wish to increase our young alumni participation rate to 8%, or 300 donors. These goals might seem out of reach at first, but by coming together as young alumni and volunteering our time in a strategic and organized way, we can further spread the University’s outreach to G.O.L.D. alumni. In conjunction with President Farvardin, the greater Stevens community has been working diligently to help raise the University to new levels by increasing our giving rates across the board. It is only with direct contact with our colleagues and former classmates that we can hope to foster an increased alumni community that will translate into positive change for the University.

It is important to remember that you are not alone in this task. This handbook will serve as your guide for:

- understanding your responsibilities as G.O.L.D. committee class representatives
- continuing the G.O.L.D. Rush Campaign for the next two fiscal years
- outlining the fundraising plans and schedules for the year ahead

We hope that you will find it a useful tool for reference throughout the year.

Thank you once again for joining us. I look forward to working with you in the months to come.

Kind regards,

[Signature]

George Blazeski ’10
Chair, G.O.L.D. Committee
## 2012-2013 CALENDAR

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</tr>
<tr>
<td>November 2012</td>
<td>Email from G.O.L.D. Committee class representatives asking Lybunt and Sybunt alumni to contribute again</td>
</tr>
<tr>
<td></td>
<td>Direct mail end-of-calendar-year solicitation to all undergraduate alumni.</td>
</tr>
<tr>
<td></td>
<td>Email to all G.O.L.D. alumni who have not yet made a gift in FY13.</td>
</tr>
<tr>
<td>December 2012</td>
<td>Email sent to all undergraduate alumni</td>
</tr>
<tr>
<td></td>
<td>Email sent to all undergraduate alumni as a last chance to give before the end of the 2012 tax year.</td>
</tr>
<tr>
<td>February 2013</td>
<td>Direct mail letter to all undergraduate alumni.</td>
</tr>
<tr>
<td>March 2013</td>
<td>Email from G.O.L.D. Committee class representatives asking Lybunt and Sybunt alumni to contribute</td>
</tr>
<tr>
<td>May 2013</td>
<td>Direct mail solicitation to all undergraduate alumni who have not yet made a gift in FY 13.</td>
</tr>
<tr>
<td></td>
<td>Email to all G.O.L.D. alumni who have not yet made a gift in FY13.</td>
</tr>
<tr>
<td>June 2013</td>
<td>Phone solicitations from G.O.L.D. Committee class representatives asking Lybunt and Sybunt alumni to contribute</td>
</tr>
<tr>
<td></td>
<td>Email to all undergraduate alumni as a last chance to give before the end of the 2013 fiscal year.</td>
</tr>
</tbody>
</table>
G.O.L.D. (GRADUATES OF THE LAST DECADE)

What is G.O.L.D.?

The mission of G.O.L.D., or Graduates of the Last Decade, is to foster a continued relationship between Stevens and the University’s youngest alumni population. For the 2013 fiscal year, G.O.L.D. encompasses all undergraduate alumni graduates between the years of 2003 through 2012, which includes over 3,000 alumni.

The primary goals of the G.O.L.D. program include:

- develop alumni leadership in recent graduates
- help young alumni understand the value of their gifts to the University
- host alumni events in affiliation with the Stevens Alumni Association (SAA)
- provide young alumni with ways to stay connected
- build affiliations through involvement with fellow alumni and programs

OUR PLAN FOR THE YEAR

Our goal for the 2013 fiscal year is to raise $83,000 from the classes of 2003 through 2012. In addition, we hope to reach 300 young alumni donors, an 8% participation rate among G.O.L.D. alumni. Much like last year, this year’s campaign will place special emphasis on increasing participation among the young alumni and engaging those who have not given gifts in the past. By increasing our outreach efforts for both gift solicitations as well as social event invitations hosted by the Stevens Alumni Association, we aim to set the foundation for a much broader base of consistent young alumni donors throughout the G.O.L.D. years.

G.O.L.D. SCHOLARSHIP

The G.O.L.D. Scholarship is awarded to an undergraduate student who, during the course of the academic year, has an unexpected financial situation requiring a re-assessment of financial need. The recipient must be in academic good standing and demonstrate a change in financial need over the aid previously awarded. As the number of scholarships and amount of scholarship dollars available are based solely on giving by young alumni, the G.O.L.D. Scholarship is often highlighted by young alumni volunteers when reaching out for gifts to fellow classmates.
G.O.L.D. (GRADUATES OF THE LAST DECADE)

G.O.L.D. RUSH CHALLENGE

In order to encourage recent Stevens Institute of Technology undergraduates to invest in their alma mater, Dr. Lawrence T. Babbio ’63, a member of the Board of Trustees, will match all gifts of $50 or more made by members of the classes of 2003 through 2012. During two periods throughout the fiscal year, the match will be increased to 2:1, to further spur alumni giving. The challenge match will focus on not only raising funds but also increasing the participation rate amongst young alumni.

G.O.L.D. COMMITTEE

In the 2012 fiscal year, the G.O.L.D. Committee was reestablished and consists of 15 class representatives across a ten-year span. The purpose of the committee is to keep alumni connected, engaged and involved in their first 10 years after graduation. The committee serves as a bridge between the University and the vast population of undergraduate alumni. George Blazeski from the class of 2010 currently holds the position of committee chair.

<table>
<thead>
<tr>
<th>Chair:</th>
<th>George Blazeski 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members:</td>
<td></td>
</tr>
<tr>
<td>Brian Lalli</td>
<td>2004</td>
</tr>
<tr>
<td>Rober J. Hoar</td>
<td>2006</td>
</tr>
<tr>
<td>John M. Frega</td>
<td>2007</td>
</tr>
<tr>
<td>Jessica Klein</td>
<td>2007</td>
</tr>
<tr>
<td>Justin Rodriguez</td>
<td>2008</td>
</tr>
<tr>
<td>Michael Bocchinfuso</td>
<td>2008</td>
</tr>
<tr>
<td>Andrew G. Kaplan</td>
<td>2009</td>
</tr>
<tr>
<td>David G. Pfeffer</td>
<td>2009</td>
</tr>
<tr>
<td>Keith B. Cassidy</td>
<td>2009</td>
</tr>
<tr>
<td>Michael Manzella</td>
<td>2009</td>
</tr>
<tr>
<td>Hillary R. Paul</td>
<td>2010</td>
</tr>
<tr>
<td>Abel N. Alvarez</td>
<td>2011</td>
</tr>
<tr>
<td>Kendra Appleheimer</td>
<td>2012</td>
</tr>
<tr>
<td>Lauren Mayer</td>
<td>2012</td>
</tr>
</tbody>
</table>
G.O.L.D. (GRADUATES OF THE LAST DECADE)

G.O.L.D. COMMITTEE (continued)

Throughout the fiscal year, the G.O.L.D. committee class representatives will be called upon for a number of tasks, including:

- Attend the alumni volunteer summit
- Participate in G.O.L.D. Committee meetings to discuss fundraising plans (schedule included below)
- Solicit assigned classmates donations to help reach both fiscal and participatory goals
- (if available) Attend G.O.L.D. events hosted by the Stevens Alumni Association (SAA), including It's a Shore Thing, Welcome Seniors, 2013 Alumni Weekend, etc.
- Participate in G.O.L.D. Telethon sessions held throughout the fiscal year
- Document all contact with classmates and provide this information to the Development Office in a timely manner

<table>
<thead>
<tr>
<th>G.O.L.D. Committee Meeting Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td>Tues, Sept 25</td>
</tr>
<tr>
<td>Tues, Feb 4</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Tues, May 6</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Reunion Class Gift Planning Guide
INTRODUCTION

Reunion activities at Stevens have a long tradition, a tradition which you, as a reunion committee member, can continue. As a volunteer, you play an important role in ensuring the success of your class' reunion gift program. This handbook will help to educate you about the planning process and will serve as a useful resource in the upcoming months.

Please do not feel limited by the suggestions offered in this guide. This is your reunion, and your ideas are the ones that count. We rely on your input and will count on your assistance to implement new ideas. Your enthusiasm is a valuable asset to the success of your reunion. We hope you will work to generate that same zeal among your classmates and encourage them to return for Alumni Weekend.

The Office of Development and the Stevens Alumni Association are here to support your efforts. Rest assured, we will do anything we can to help make your reunion a successful one.

Thank you for volunteering for Stevens!
ROLE OF THE REUNION COMMITTEE

In this special reunion year, the Class Captain and the entire Reunion Committee have special tasks and responsibilities. The completion of the following key steps will ensure the success of the reunion class gift drive.

Attend committee meetings. Planning meetings are the vehicle through which the fund drive is accomplished. The frequency of meetings may range from 3 to 6 in a given reunion year. Staff from the Office of Development will assist each class in creating an appropriate meeting schedule.

Determine an attainable class goal. The Reunion Class Captain works in conjunction with his/her committee, the Stevens Fund Committee and the Development Office staff in setting a dollar goal to be raised. Also, a target level of class participation will be set at the beginning of the Fund year.

Decide upon a class gift. The Reunion Committee has the important task of selecting an appropriate gift to be presented on behalf of the class. A list of past gifts will be provided by the Development Office to assist in this process. A committee may opt to provide a limited number of choices to fellow classmates and ask for their involvement in the selection process.

Write Class Solicitation letters. The Class Captain has the added responsibility of drafting a solicitation letter for distribution to the entire class. Other committee members may assist in the writing of this letter, if they desire.

Make committee assignments and personally solicit classmates. Past experience has demonstrated that individual solicitations (in person or via telephone contact) produce the greatest results in raising funds. For this reason, it is vital for the committee members to take it upon themselves to contact fellow classmates and spread the enthusiasm about the reunion and the special class gift.

Attend telethons. The Office of Development organizes two local telethons on campus each year; one in the Fall and a second in the Spring. These events provide excellent opportunities for committee members to contact their assigned classmates. Additionally, reunion classes are afforded a special invitation to schedule a class telethon at any time during their planning year.

Attend Alumni Weekend. Finally, once all the work has been completed, the reunion committee may reunite on campus in the early summer to renew old friendships and enjoy the thrill of a successful Fund drive in honor of their anniversary.
PLANNING TIMELINE

While it may seem that an entire year may seem unnecessary for the organizing of a class reunion gift, experience has proven otherwise. Therefore, this 10-month planning schedule has been developed to aid the committee in its efforts. As with all information in this guide, this timeline is merely an outline and should be altered to meet the individual needs of the class.

<table>
<thead>
<tr>
<th>Month 2012</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>September</td>
<td>Select Committee Members; Determine Class Goal/Gift; 1st Class Letter/Solicitation</td>
</tr>
<tr>
<td>October</td>
<td>2nd Committee Meeting; 2nd Class Letter/Solicitation; Fall Telethon</td>
</tr>
<tr>
<td>November</td>
<td>Make Assignments</td>
</tr>
<tr>
<td>December</td>
<td>3rd Class Letter/Solicitation</td>
</tr>
<tr>
<td>February</td>
<td>3rd Committee Meeting; Class Telethon; Alumni Weekend Invitation Packet</td>
</tr>
<tr>
<td>March</td>
<td>4th Class Letter/Solicitation</td>
</tr>
<tr>
<td>April</td>
<td>4th Committee Meeting; Determine Clean-Up Strategy</td>
</tr>
<tr>
<td>May</td>
<td>5th Class Letter/Solicitation</td>
</tr>
<tr>
<td>May 31-June 2</td>
<td>Alumni Weekend; Follow-Up Class Letter/Solicitation</td>
</tr>
<tr>
<td>July</td>
<td>Campaign Wrap-Up Letter</td>
</tr>
</tbody>
</table>
FUNDING AND NAMING OPPORTUNITIES

Reunion classes are encouraged to choose anyone of the projects mentioned below. To determine your class project consider Stevens' needs, your class' giving history and participation percentage, and of course, the Reunion Committee's interests.

2012-2013 Stevens Funding Needs

The following items represent projects of significant priority for Stevens in the coming year. While there are exceptionally large funding goals for some of these areas, all class gifts made in support of these projects will be notably recognized.

- **Scholarship Fund**
  A fund of any amount can be used to establish a term scholarship fund. Grants would be made annually in the class' name, until the Fund is exhausted. Alternatively, the class may choose to initiate an endowed scholarship fund ($75,000 is the minimum to endow a scholarship fund). For the latter, class members can make contributions to the fund in years to come and the fund will continue in perpetuity. Earnings from the endowment are used each year to assist undergraduate or graduate students.

- **The Stevens Fund**
  The Stevens Fund is the collection of annual gifts to the Institute that are not restricted for a specific use. The Fund supports things like the school's annual operating budget, scholarships and laboratory upgrades. These gifts enable Stevens to support faculty initiatives and research and to maintain an environment of high academic standards (there is no minimum gift level).

- **Campus Naming Opportunities**
  There are a variety of gift possibilities available for naming throughout campus, be it in the area of athletics, the Babbio building or other related improvement or expansion projects. For more detail, please contact the Office of Development at Stevens.
WHAT COUNTS TOWARD THE REUNION GIVING TOTALS?

The Reunion Project Fund includes all contributions and pledges made by you and your classmates whether in response to Committee solicitations, Class Agent letters, or telethons. All commitments to the Stevens Fund, scholarships and capital purposes received between July 1 and the following June 30 will count towards the class total.

Listed below are various ways through which gifts are made to the Institute.

**Outright Gifts**
Any new gifts or pledges made between July 1 and the following June 30
Any payments made between July 1 and the following June 30, towards previous unpaid pledges.

**Non-Cash Gifts**
Giving a gift of publicly traded stock, bonds or mutual funds that have increased in value and that you have owned for more than one year may provide greater tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock or securities.

**Matching Gifts**
More than a thousand companies offer varying levels of corporate match for their employees’ philanthropic interests. Direct your matching gift to Stevens and the University will recognize you for the full amount of your own gift plus the resulting corporate match. To find out if your employer (or your spouse's employer) has a matching gift program, please visit www.stevens.edu/dev/matching. Don’t forget to look up the company from which you retired or on whose board you serve—it may match your gift to Stevens. If your company offers matching gifts, please contact your human resources department for details on how to apply. Thank you for multiplying the impact of your gift to Stevens Institute of Technology.
Planned Gifts

Any major gift made to Stevens as part of your overall financial and/or estate planning. Types of planned gifts include: Outright gifts that use appreciated assets as a substitute for cash (as mentioned prior); Life income gifts such as Charitable Gift Annuities and Charitable Remainder Trusts that provide annual income to you and/or whomever you designate, Bequests for Stevens in your will or living trust, and Beneficiary Designations of Stevens in a Life Insurance Policy or Retirement Account. For members of the Old Guard, we will count towards the class’s anniversary campaign the current fair market value of the life income gift, bequest intention and beneficiary designation shared with Stevens during the Reunion year.
Senior Class Gift
SENIOR CLASS GIFT

What is the Senior Class Gift?

After years of hard work and dedication, the senior class prepares for graduation, employment, and beyond. During this time, each and every member of the class is tasked with looking back on his or her college experience at Stevens Institute of Technology and determining the legacy he or she wishes to leave behind. The Senior Class Gift Committee is assembled and chooses a gift and plans a fundraising campaign to solicit graduating seniors. Campaigns run through a class’ final year at Stevens through the end of their first year as young alumni.

Prior Senior Class Gift Projects

2002  Improvements to Castle Point
2003  AV system for the Schaefer Fitness Center
2004  Clock Tower pt. 1
2005  Benches by tennis courts
2006  Campus maps
2007  Babbio Center patio benches
2008  G.O.L.D. Scholarship
2009  Clock Tower pt. 2
2010  Library Media Center
2011  Pavers between Library and Wittppen Walk
2012  Library Archiving Restoration
SENIOR CLASS GIFT (continued)

Class of 2010

The 2010 Senior Class gift involved raising funds for the SC Williams Library Multimedia Lab, born out of the increasing need for students to have a dedicated room to practice both individual and group presentations. Using the currently available funds, a smart board has been ordered for the media room. Additional items will be ordered at a later date.

<table>
<thead>
<tr>
<th>2010 Senior Class Gift Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Blazeski</td>
</tr>
<tr>
<td>Daniel Ready</td>
</tr>
<tr>
<td>Stan Valvis</td>
</tr>
<tr>
<td>Hillary Paul</td>
</tr>
<tr>
<td>Stephen Yanczura</td>
</tr>
</tbody>
</table>

Class of 2011

The Class of 2011 senior gift was to repave the walkway between the library and the Howe Center circle. The extent of the replacement walkway will depend on the amount of money raised. For all alumni that made a gift of $140 or more at the legacy level, a paver stone with their name will be included in the walkway renovation.

<table>
<thead>
<tr>
<th>2011 Senior Class Gift Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abel Alvarez</td>
</tr>
<tr>
<td>Lauren Griggs</td>
</tr>
<tr>
<td>Angela Parriott</td>
</tr>
<tr>
<td>Derek Straub</td>
</tr>
<tr>
<td>Kyle Brisson</td>
</tr>
<tr>
<td>Rick Leung</td>
</tr>
<tr>
<td>Regina Pynn</td>
</tr>
<tr>
<td>Cassidy DeSchryver</td>
</tr>
<tr>
<td>Jeffrey Lichtenfeld</td>
</tr>
<tr>
<td>Stephanie Spelman</td>
</tr>
<tr>
<td>Ellyn Griggs</td>
</tr>
<tr>
<td>Amanda Nauman</td>
</tr>
<tr>
<td>Christopher Stoddart</td>
</tr>
</tbody>
</table>
SENIOR CLASS GIFT (continued)

Class of 2012

The 2012 Senior Class gift will focus on improving an often-forgotten resource on campus, the S.C. Williams Library, which holds more than students and alumni are aware. The University has been gifted many priceless artifacts throughout the years by alumni and friends, but does not have the resources to properly store and display these items. The 2012 Senior Class Gift campaign aims to raise money to bring some of these priceless pieces out of storage and into the sights of the Stevens community.

The gift will be chosen based on the total amount of money raised throughout the campaign:

<table>
<thead>
<tr>
<th>Class Raises</th>
<th>Gift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Framing of select Stevens historical documents</td>
<td>$1,000-$3,000</td>
</tr>
<tr>
<td>Restoration of paintings or decorative arts</td>
<td>$3,000-$7,000</td>
</tr>
<tr>
<td>Display cases for Leonardo Da Vinci notebook</td>
<td>$7,000+</td>
</tr>
<tr>
<td>facsimiles</td>
<td></td>
</tr>
</tbody>
</table>

2012 Senior Class Gift Committee

Kendra Appleheimer  Lauren Gutierrez  Paul Peskosky
Nicholas Barresi    Alecia Hart       Alaina Spicer
John Disimino      Lauren Mayer       
Larry Giannechini  Brianne Pentz
Dear [alumni first name],

These are exciting times for Stevens Institute of Technology. President Nariman Farvardin’s first academic year is coming to a close and there has been, and continues to be, strong and positive growth throughout the community. Bloomberg Businessweek has just released its latest college rankings, and Stevens has risen to #23 in the nation in "return on investment" — the total worth of the Stevens education we received in average career earnings, minus the reasonable cost of that education. With such accomplishments, there is great need to not just support the current successes, but also to provide for sustained excellence well into the future.

As the fiscal year comes to a close on June 30, Stevens is counting on you to be a part of the proud cadre of donors who understand the value of earning a Stevens degree and understand how important it is to help prepare the students of today to become the industry leaders of tomorrow. Participation signals alumni pride and sends a message to the academic world about the quality of our alumni and the degree of their accomplishment. Consistent annual giving helps ensure the continued excellence of the Stevens experience. Whether you choose to support the Stevens Fund, our scholarship programs, an academic program, or athletics, your support will have a direct and immediate impact on the lives of our students.

Your participation and philanthropy is a vote of confidence in Stevens and its outstanding students. I hope you will consider a gift of any amount, because every donation – no matter the size – has an impact campus-wide.

Thank you in advance for your support.

Sincerely,

[Class Representative Name] ’[Class Representative Year]
Class Representative, Class of [Class Year]
Dear [alumni first name],

This year will mark the 60th Anniversary of your graduation from Stevens. This milestone is the perfect opportunity to catch up with old friends and come back to see what’s new on Castle Point. Plans are underway for an exciting and fun Alumni Weekend but having a memorable reunion requires participation from you!

Another component of your 60th reunion celebration is your Class Gift commemorating this anniversary. For your 60th, there is a wonderful opportunity for you to help increase your Class and/or Term Scholarship. By giving to your class scholarship you are allowing the University to continue to provide an innovative environment that will allow Stevens outstanding students to thrive in their studies. You can make a onetime gift, or spread a larger commitment over three years. Also, contributions of $1,000 or more are recognized by membership in the Edwin A. Stevens Society.

[This is where you would input your class’ personal story. Why do you think it’s important to give back to Stevens in honor of your reunion?]

Please plan on attending as much of the weekend as you can and remember that every gift is important no matter the size. For more information on how to become further involved please contact Zef Ferreira ’00 in the Office of Development at Zef.Ferreira@stevens.edu or 201.216.5247.

Thank you in advance for your support and participation.

Sincerely,

[Committee Member Name] ’[Class Year]
Committee Member, Class of [Class Year]
G.O.L.D. RUSH LAUNCH SPRING APPEAL LETTER
SPRING 2012

Dear [alumni first name],

Alumni participation and support is imperative to the function and growth of any academic institution. The University’s new president, Dr. Naramin Farvardin, is hard at work proposing strategic new initiatives that will lead to an improved Stevens experience for both current and future students. Contributions from alumni and friends are important during these times of change, and your support will both improve our national rankings and also play a direct role in bringing new plans and projects to fruition.

President Farvardin is not alone in his efforts to stimulate support. To help increase alumni participation, Dr. Lawrence T. Babbio ’66, Chairman of the Stevens Institute of Technology Board of Trustees has issued a million dollar matching gift campaign to foster increased support for the University called G.O.L.D. Rush. With G.O.L.D. Rush, Dr. Babbio will evenly match every gift at a minimum of $50 with his own, which can be applied to any designation including the support of specific scholarships, athletic programs, or campus clubs to general donations to the Stevens Fund. This matching program also provides a fantastic opportunity for young alumni to transition into the Associate Edwin A. Stevens Society, requiring only half the normal gift amount for induction.

Our experiences at Stevens varied greatly, and this challenge is an opportunity for each of us to give to what we love. These gifts, so generously matched by Dr. Babbio, will help enhance the Stevens experience for the next generation of students following in our footsteps for decades to come.

Thank you in advance for helping make your impact on the University, its ranking and status, and the program and research for which we are so renowned. You are making a tremendous difference.

Sincerely,

[Class Representative Name] ’[Class Representative Year]
Class Representative, G.O.L.D. Committee
Subject: Stevens Class of '61: There is Still Time to Make a Difference!

Dear Classmates,

I’m writing to ask that you join your classmates and other alumni in support of our alma mater and for the great work of our new President, Dr. Nariman Farvardin in his inaugural year. He joined Stevens July 1, and has not slowed down since. Dr. Farvardin is providing Stevens with the focused leadership that is essential in this highly competitive, post-industrial, global economy. And, most importantly, he is committed to advancing Stevens to renewed levels of prestige through an elevated reputation, increased alumni engagement and broader impact on society.

Fiscal Year 2012 closes on Saturday, June 30. If you have not yet made a gift to Stevens, I encourage you to do so. Your gift will boost overall alumni participation and also the Class of 1961’s. Last year our class had 46% giving participation – this year to date we are at only 24%. We need 24 more donors to meet last year and more to do better.

Please join me and the 33 other members of our class who have stepped forward with a gift and help us do better than last year. I hope you will give what you can, but even a $20 contribution will demonstrate your support of our alma mater and build on our class pride!

You can make your gift online at www.stevens.edu/makeagift or by calling the Office of Development at 201-216-5241.

Sincerely,

[Committee Member Name] ’[Class Year]
Class Representative, Class of [Class Year]
Dear [alumni first name],

As you all know, President Farvardin has been working hard to improve Stevens for both current and future students since his start last year. He knows alumni participation is important to make these changes happen and has been rallying the support of many engaged individuals and groups throughout the Stevens community to act upon his plans. One alumnus has risen to the challenge to aid Dr. Farvardin’s initiatives, Dr. Lawrence Babbio ’66, by donating $1 million to the University in attempts to spur alumni participation. A portion of this gift will be used to match all gifts over $50 made by G.O.L.D. members, with the match applied to the designation specified by the alumni donation. This provides the unique opportunity for us to give back to what we love and help improve the Stevens experience for generations to come.

[This is where you would input your personal story. Why do you give to Stevens? Why do you think it’s important to give back to Stevens? What was important to you on campus that you’ve given back to since graduation? What changes have you seen as a result of your gift?]

Alumni donations are important, no matter how small. While gift amount plays a factor in funding of initiatives, athletic teams, student clubs, organizations and academic departments, smaller donations from large portions of alumni help increase the alumni giving percentage of the University. Higher numbers mean higher rankings in national publications, adding significant value to each and every degree earned from Stevens. Our goal is to reach an additional 250 alumni donors by the end of this fiscal year, ending on June 30th 2012, so please donate any amount you can to help us reach our goal.

Sincerely,

[Class Representative Name] ’[Class Representative Year]
Class Representative, G.O.L.D. Committee
GENERAL ALUMNI CALL SCRIPT #1

Introduction:

May I please speak with [name of alum]?

Hello, my name is _________________________, and I am an alum from the class of [class year] at Stevens Institute of Technology. How are you today/tonight?

Today I am calling you and other alumni on behalf of Stevens Institute of Technology because we are trying to raise money which will be used to provide essential resources and opportunities to today’s Stevens’ students.

Build rapport:

Ask them what their time was like at Stevens.
Ask them what they’ve been doing since graduation.
Update them on current events on campus.

Make the case:

As I said earlier, we are trying to raise much needed money for Stevens. Your support is more critical than ever. Keeping this in mind, will you show your support of Stevens with a ____________ gift?

If NO:

(Listen and respond appropriately) I understand. Each and every gift is important and counts, regardless of size. Could you help us with any size gift that you feel comfortable with? Any size gift matters and can help make a difference. Another goal that we have is to have current and updated information for all of our alumni. Could I update your home and business information while I have you on the phone? Are there any questions I can answer for you about the University?

IF Yes:

Thank you so much for your gift of [amount]! We accept Visa and Master Card. Which one works best for you? Thank you so much for your gift of [amount]/pledge of [amount], [donor’s name]! Stevens Institute of Technology appreciates your gift very much.

*If person is not there leave a message: Hi, my name is ________________________. I am calling on behalf of Stevens Institute of Technology. Tonight we were calling fellow alumni to ask for their support in raising the alumni giving participation level. We are sorry we missed you and hope that you may consider helping us reach this goal. Any questions please call the Office of Development at 201-216-5241.*
GENERAL ALUMNI CALL SCRIPT #2
-STEVENS FUND FOCUS-

Introduction:

Hi, may I speak with [alumni name] please?

Hello, this is ______________, your classmate from Stevens Institute of Technology Class of [class year]. This year, I am serving as a Class Representative for our class and wanted to contact you to ask for your annual support of the Stevens Fund.

Importance of Unrestricted Gifts:

Unrestricted gifts are crucial to the Stevens ongoing excellence because they can be used wherever they are needed most—for scholarship and financial aid programs, research initiatives and campus improvements.

Our gifts provide a great opportunity to express our appreciation for the superior education we received at Stevens Institute of Technology and to provide current and future Stevens students with the same opportunity.

Would you consider a gift of $_________? (amount higher than their usual gift/pledge).

Thank You With Commitment:

Thank you very much for your generous support of Stevens by making an annual gift. There are a variety of ways we can process your gift:

• You may send a check to the The Stevens Fund at:
  Stevens Institute of Technology
  Castle Point on Hudson
  Hoboken, NJ  07030
• You may make your gift online at www.stevens.edu/makeagift.
• You may call (201) 216–5241 to make a credit card gift over the phone.

Thank you again for your support of our alma mater and the students it serves.

Thank You Without Commitment:

Thank you very much for your time and for considering my request of support for [designation]. It was great speaking with you. I will follow-up with you again soon. Please let me know if there is any additional information I can provide you.

* If person is not there leave a message: Hi, my name is _______________. I am calling on behalf of Stevens Institute of Technology. Tonight we were calling fellow alumni to ask for their support in raising the alumni giving participation level. We are sorry we missed you and hope that you may consider helping us reach this goal. Any questions please call the Office of Development at 201-216-5241.
50th REUNION CLASS CALLING SCRIPT

“Hello, my name is ____________, a fellow classmate from [class year]. May I please speak to________? I’m calling this afternoon to wish you a happy anniversary of our graduation from Stevens.

We will be celebrating our 50th during Alumni Weekend [dates]. Do you think you will be joining in on the weekend celebrations?

There are a lot of exciting activities planned. To find out more information about the events please visit stevens.edu/alumniweekend. It's sure to be a great time.

Another great thing about reunions is the opportunity to come together as a class to support our class scholarship, the Class of [class year] Endowed Scholarship Fund and/or the Class of [class year] Term Scholarship Fund in honor of our 50th reunion.

Thank you for your gift of $XX, many alumni in a reunion year are making a pledge to be completed by their next reunion. Can we count on you for your gift of $XX over the next 5 years? Thanks, great, we ask that you make your initial gift of $XX by Jun 30 and each year you will receive a reminder in the mail until your pledge is fulfilled.
10th REUNION CLASS CALLING SCRIPT

Hi, my name is _______________, a fellow classmate from [class year] and I'm calling to wish you a happy anniversary of your graduation from Stevens.

Stevens will be celebrating your 10th Reunion during Alumni Weekend [dates]. Do you think you will be joining in on the weekend celebrations?

There are a lot of exciting activities planned. To find out more information about the events please visit stevens.edu/alumniweekend. It's sure to be a great time.

Another great thing about reunions is the opportunity to come together as a class to support the University. In honor of your 10th reunion, [begin step ask].

Thank you for your gift of $XX, many alumni in a reunion year are making a pledge to be completed by their next reunion. Can we count on you for your gift of $XX over the next 5 years? Thanks, great, we ask that you make your initial gift of $XX by Jun 30 and each year you will receive a reminder in the mail until your pledge is fulfilled.

* If person is not there leave a message: Hi, my name is _______________. I am calling on behalf of Stevens Institute of Technology. Tonight we were calling fellow alumni to ask for their support in honor of their reunion year. We are sorry we missed you and hope that you may consider helping us reach our reunion goal. Any questions please call the Office of Development at 201-216-5241.
INTRODUCTION:

Hi, can I please speak to ________________?

Hello ____________, this is [your name] from the class of [you class year].

How are you? Listen and respond.

First, I’d like to thank you for your past gift to the [prior gift designation].

1ST ASK:

I just wanted to let you know that the end of the fiscal year June 30 is quickly approaching and I’ve noticed that you have not made a gift this year/renewed last year’s donation.

Support from our young alumni is very important and has been a special focus of our new President, Dr. Naramin Farvardin. One of his main goals is to increase our G.O.L.D. alumni giving participation to 10%. As you know, the G.O.L.D. Rush challenge has been put into effect as of this fiscal year and is matching all gifts over $50 made by young alumni. For the month of June, however, the match has been increased to 2:1, giving young alumni further incentive to give back to the University.

Both the gift and the match will be applied to any designation of your choosing, including:

- G.O.L.D. Scholarship
- The Stevens Fund
- Athletics
- Drama Society
- Scholarships

… to name only a few.

Would you like to renew last year’s gift to the [gift designation] for [prior gift amount]?
G.O.L.D. ALUMNI CALLING SCRIPT  
SPRING 2012 CALLS (continued)

If No, 2nd Ask:

I also recognize that you might not be able to give a large gift at this time; however any amount is important to our participation rate. The act of you giving is more important than the size of your gift since participation plays an increasingly important role in academic rankings throughout national publications. Even a contribution of $2, $5, or $10 helps today’s students while also improving the value of your degree and raising Stevens’ profile.

Would you like to help us increase our giving percentage and make a gift of $5?

If yes:

Great! Thank you so much for your contribution.

Since we’re coming up close to the end of the fiscal year, it would be easiest if you pay by credit card online. Please visit stevens.edu/makeagift to make your gift by credit card online.

If No to credit card gift:

We can send you a pledge card with a return envelope for your check. What address can we send the card to? *Take address information*

- Name
- Street
- City, State Zip

Remember to encourage donors to make a gift online!

If No to any gift:

I understand. Thank you for your time today/tonight. Have a great day/night!

Closing and gave a gift:

Again, thank you so much for your gift and helping us reach our goal of 10% G.O.L.D. alumni participation.
THANK YOU!

As a volunteer for the Office of Development, you are part of a tradition of alumni leadership and support that makes Stevens the world-class institution it is today. Your role is pivotal in making the Stevens experience a meaningful and rewarding one for today’s students.