

Sweet Briar College  
Annual Fund

*Boxwood Circle 2012  
Volunteer Handbook*





## Welcome to Boxwood Circle Giving 2012

Thank you for demonstrating your ongoing commitment to Sweet Briar by agreeing to serve in the Boxwood Circle Giving Program for 2012. Being a volunteer is meaningful to the College, and should be rewarding and meaningful to you.

As a Boxwood Circle volunteer you will:

- ⊗ Raise vital financial support for the College
- ⊗ Keep supporters connected and informed about Sweet Briar today
- ⊗ Safeguard confidential giving information

This guide will give you all the information you need to carry out a successful campaign and to gain an understanding of both the Annual Fund and Boxwood Circle Giving. In order for the program to be a success, each volunteer must fulfill her duties in a timely and dedicated manner.

Please be assured that the Annual Fund staff is always available to answer any questions or concerns you have and to encourage you in all your efforts. ***Thank you again, and we look forward to working with you!***

### Volunteer Responsibilities



- 1) Make your best gift **EARLY!**
- 2) Get trained to make volunteering fun and effective.
- 3) Come home October 14-16.
- 4) Make your calls to classmates in a timely manner.
- 5) Be confident, and ask for the suggested gift.
- 6) Send pledge cards and follow-up notes promptly.
- 7) Report pledges, changes and comments to staff.
- 8) Review your online giving reports regularly.
- 9) Send thank-you notes, and follow up as needed.

### Annual Fund Overview

The Annual Fund comprises unrestricted gifts that impact each facet of the Sweet Briar College experience. Unrestricted gifts are crucial to the success of the College and provide essential necessities such as student scholarships, faculty/staff salaries, academic programs, and other less exciting but equally important needs. In addition, it makes growth and new initiatives possible.

Boxwood Circle Giving is an integral source of financial support for the College, and two years ago the program celebrated its **50<sup>th</sup> anniversary** of encouraging supporters to make their very best gifts to Sweet Briar. There is much to celebrate as the program moves into the next 50 years. Below are some Boxwood Circle facts to highlight the importance of the program to the strength of the College.



- ⊗ The Boxwood Circle has grown from an ambitious goal of securing 31 leadership donors in 1959-60 to this year's goal of securing 325 leadership donors in 2011-12.
- ⊗ Last year Boxwood Circle donors contributed a total of \$1,284,589 in unrestricted support for the College. That is over 60 percent of the total 2011 Annual Fund!

## Overview of *Boxwood Circle* Giving



In the 1959-1960 academic year, Gladys *Wester* Horton '30, Elizabeth *Bond* Wood '34, and Nancy *Dowd* Burton '46 together decided they wanted to raise alumnae giving to a new level. Elizabeth looked out at the splendid circle of boxwoods in front of Sweet Briar House and counted 31 magnificent giants. Gladys, Elizabeth, and Nancy made it their goal that year to find 31 alumnae who would each contribute \$1,000 or more to Sweet Briar College. As expected, they met their goal.

Over the next 50 years, the Boxwood Circle giving society grew to include levels of \$5,000 and \$10,000, now the Fountain Society and Column Society respectively. Thanks to the leadership of those such as Gladys, Elizabeth, and Nancy, and many other dedicated alumnae leaders, the program has grown steadily over the years and consistently secures more than 300 leadership donors each year.

To keep up with inflation and the increasing costs of education, the Boxwood Circle was restructured in 2003 and now honors donors who give \$2,500 or more to the College in a fiscal year. These gifts may be cumulative and include gifts to Friends funds and matching gifts.

As Sweet Briar moves into the next 50 years of the Boxwood Circle, the distinguished history of service and giving continues. This year's Boxwood Circle is led by Jane *Reeb* Short '74, with a goal of securing 325 leadership givers. Your efforts are vital to the program's success.

In addition, the Boxwood Circle has been enhanced by new initiatives designed to forge an even stronger connection between Boxwood Circle members and the College and to demonstrate Sweet Briar's deep appreciation for those supporting the College at the leadership level. Those initiatives include:

-  Email communications for members with the most recent updates on what is happening at SBC
-  Invitations to special events, both of academic and cultural interest, for members

By serving Sweet Briar as a volunteer in the Boxwood Circle Giving Program, you will be carrying forward a long and distinguished tradition of the College and will be instrumental in ensuring her strength and vitality for the future.

### Calendar for Boxwood Circle 2011 - 2012

July 2011	<input checked="" type="checkbox"/> Boxwood chair works with staff to plan the 2012 program
August/ September 2011	<input checked="" type="checkbox"/> Finalize committee
	<input checked="" type="checkbox"/> Solicit committee and leadership gifts
	<input checked="" type="checkbox"/> Committee members receive solicitation forms (DSAFs) and begin making calls
	<input checked="" type="checkbox"/> Participate in volunteer training
September/ October 2011	<input checked="" type="checkbox"/> Boxwood Circle Annual Cardboard Boat Regatta
	<input checked="" type="checkbox"/> Attend Homecoming (October 14-16) and Boxwood Circle Reception
	<input checked="" type="checkbox"/> Go online to check your Volunteer Reports
	<input checked="" type="checkbox"/> Return DSAFs
December 2011	<input checked="" type="checkbox"/> Go online to check your Volunteer Reports
February 2012	<input checked="" type="checkbox"/> Committee members make follow-up calls
	<input checked="" type="checkbox"/> Go online to check your Volunteer Reports
March 2012	<input checked="" type="checkbox"/> Remaining assignments turned over to student Phonathon
	<input checked="" type="checkbox"/> Go online to check your Volunteer Reports

## Gift Recognition Societies

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**Would you like to designate your gift?:** Gifts to the Annual Fund are unrestricted, but there are designations within the Annual Fund available to direct support to specific areas. The designations within the Annual Fund are:

- |  |  |
|--|--|
|  SBC's Greatest Needs |  Campus Preservation    |
|  Student Scholarships |  Athletics and Riding   |
|  Faculty Support      |  Library and Technology |

**Recognition:** Sweet Briar has Gift Recognition Societies as highlighted below. All gifts given in a year are cumulative regardless of restricted or unrestricted status (except for the Bell Tower Society which counts only unrestricted gifts); therefore, the total determines membership at any level.


***Every gift is important.***

**Column Society** - \$10,000 or more

**Oak Society** - \$1,000 to \$2,499

**Fountain Society** - \$5,000 to \$9,999

**Golden Stairs** - \$500 to \$999


 **Boxwood Circle** - \$2,500 to \$4,999

**Junior Bench Society** - \$250 to \$499

**Hitching Post Society** - \$100 to \$249

**Pink Rose Society** – New in 2009-2010, the Pink Rose Society recognizes consistent giving of 10 or more years for alumnae between 10-24 years post-graduation.

**Silver Rose Society** – Founded at the beginning of ***Our Campaign For Her World***, the Silver Rose Society recognizes extraordinary past and present support to the College of consistent giving of 25 years or longer.

 **Boxwood Circle** in particular has its own national chair and a committee of volunteers from various class years who assist in promoting leadership giving. The Boxwood Circle honors donors giving \$2,500 or more in total gifts within one giving year.

**Young Alumnae Bell Tower Society** - Founded in 2009-2010, the SBC Young Alumnae Bell Tower Society is a tiered leadership recognition program for alumnae in their first through 10<sup>th</sup> years post-graduation. Individuals who have graduated within the last five years are recognized at a leadership level for giving \$250 or more annually to the Annual Fund. Those individuals in their sixth through 10<sup>th</sup> year post-graduation are recognized at a leadership level for giving \$500 or more annually to the Annual Fund.

## Calling Checklist

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### 1. Prepping for your calls

- ☐ Review DSAFs to make sure all contact information is included
- ☐ Go online to check Volunteer Reports for updates before calling
- ☐ Review *Annual Fund at Work*
- ☐ Explore the Sweet Briar College Website for news and current events



### 2. Making the call

- ☐ Share news of SBC
- ☐ Connect with assigned alumnae/parents
- ☐ Make the ask
- ☐ Update contact information on the DSAF and share news/comments in the note section
- ☐ Record results of the ask



### 3. Ways to give

- ☐ Online at [giving.sbc.edu/gift](http://giving.sbc.edu/gift)
- ☐ Toll-free by phone at 888.846.5722  
*The College accepts American Express, Discover, electronic checks, MasterCard, and VISA*
- ☐ Checks should be made payable to Sweet Briar College and mailed to:  
*Annual Giving  
Box 1057  
Sweet Briar, VA 24595*
- ☐ Installments and pledges must be completed by June 15, 2012
- ☐ Stock gifts
- ☐ Always remember matching gifts



### 4. Follow up

- ☐ Mail a pledge card with follow-up note
- ☐ If a credit card gift is preferred, encourage the donor to make that gift online
- ☐ Return all DSAFs to Annual Fund Office with results recorded
- ☐ SBC will mail pledge reminders
- ☐ SBC will send acknowledgments for tax purposes
- ☐ Go online to check your Volunteer Reports regularly and write a thank-you note to everyone who makes a gift

# Sample Donor Solicitation Assignment Form (DSAF)

**FRONT**

**Mrs. Susie Sweet Briar**  
134 Chapel Rd  
Sweet Briar, VA 24595

Amount of Pledge \$ \_\_\_\_\_

ID#: P0000001  
12ABCOCN  
Contacted by: Sally Vol \_\_\_\_\_ '62

If the person you call does not make a specific pledge, **pencil** in the ask amount here.

Please complete the form on the back and return in the enclosed envelope. Gifts and pledges must be complete by **June 15, 2012** in order to be counted toward this fiscal year. Thank you!

## DONOR SOLICITATION ASSIGNMENT FORM

Class: 1962  
Category: ALUM; PARF

Contacted by: Sally Volunteer '62

Verify contact information, and make any contact changes in this box

**Susan Sweet Briar**

**Salutation: Susie**

**Address Name:** Mrs. Susie Sweet Briar

**Daughter's Name:** Ella Wilson '86 (ALUM)

**Spouse name:** Preston

**Home Tel. No.:** (999) 999-999

**Business Tel. No.:** (888) 888-8888

**Address:** 134 Chapel Rd  
Sweet Briar, VA 24595

**Home E-mail Address:** Susie\_Sweet@gmail.com

**Business E-Mail:** sbriar@wo \_\_\_\_\_

**Ask Amount:** \$2,500

Ask Amount

**2011 Giving Society:** Boxwood Circle

**Amount Pledged \$** \_\_\_\_\_

2012 YTD Annual Fund Giving: \$0.00  
2012 YTD Annual Fund Pledge: \$0.00  
2011 Annual Fund Giving: \$2,500  
2010 Annual Fund Giving: \$2,500  
2009 Annual Fund Giving: \$2,500

Please note Address/Telephone Changes Here:

Full Name: \_\_\_\_\_

Salutation: \_\_\_\_\_ Spouse name: \_\_\_\_\_

Address Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Tel. No.: \_\_\_\_\_

Bus. Tel. No.: \_\_\_\_\_

Home E-mail: \_\_\_\_\_ ☐ Preferred

Bus. E-mail: \_\_\_\_\_ ☐ Preferred

2012 YTD Restricted Giving: \$50.00  
2011 Restricted Giving: \$50.00  
2010 Restricted Giving: \$0.00  
2009 Restricted Giving: \$300.00

Recent AF and restricted giving history

Record pledge here

(Please return the bottom portion to the Development Office.)

## Contact Record

Date	Type of Contact	Contact Response	Follow Up

Use this table to keep track of call attempts and follow up needed.

**Comments:**

Use this area to record any notes from your call that would be of interest to the College.

**Back**



# Sample Calling Report

BC09 (Boxwood Committee 2009)

Committee Member

Telephone  
Descriptor

Solicitor: Smith, Suzy Jones

ID: P00024983

Anderson, Sally Switzer

Maiden name: Sally Smith

P00012345

Prosp.manager: Terry Nash

Class: 1949

Donor codes: ALUM

PO Box 1234

(PR )Mrs. Sally Anderson

Mission City PA 19087-4815

Phone: ( 610 ) 111-2222

Type: PR

<u>Fisc</u>	<u>Campaign</u>	<u>Designation</u>	<u>Outright Gift</u>	<u>Pledge Made</u>	<u>Pledge Pmt</u>	<u>Total Giving</u>	<u>Total Received</u>
2009	AF09	AFSBCNON	\$723	\$0	\$0	\$723	\$723
2009	AR09	FDFOA	\$25	\$0	\$0	\$25	\$25
2009	AR09	FDFOL	\$35	\$0	\$0	\$35	\$35
<b>Donor total*:</b>						<b>\$783</b>	<b>\$783</b>

Volunteer, Susan Dawn			Maiden name: Susan Volunteer				
P00012121			Prosp.manager: Laura Glover		Class: 1958		
Donor codes: ALUM; BDDF; PARF							
134 SW Chapel Rd Apt 233			(PR ) Miss Susan Volunteer				
Hendersonville		MI	48236-3455	Phone: ( 313 ) 381-6373	Type: PR		
<u>Fisc</u>	<u>Campaign</u>	<u>Designation</u>	<u>Outright Gift</u>	<u>Pledge Made</u>	<u>Pledge Pmt</u>	<u>Total Giving</u>	<u>Total Received</u>
2009	AF09	AFSBCNEEDS	\$0	\$1,000	\$1,000	\$1,000	\$1,000
<b>Donor total*:</b>						<b>\$1,000</b>	<b>\$1,000</b>

Donor Type

Penny, Sarah F. P00034297			Maiden name: Sarah Fowler Prosp.manager: Laura Glover			Class: 1986	
Donor codes: ALUM 1134 Cavalier Circle Forest CT 06107			(PR ) Ms. Nathan Fowler Penny Phone: ( 860 ) 276-0834			Type: PR	
<u>Fisc</u>	<u>Campaign</u>	<u>Designation</u>	<u>Outright Gift</u>	<u>Pledge Made</u>	<u>Pledge Pmt</u>	<u>Total Giving</u>	<u>Total Received</u>
2009	AF09	AFSBCNON	\$800	\$0	\$0	\$800	\$800
<b>Donor total*:</b>						<b>\$800</b>	<b>\$800</b>

Restricted or  
Annual Fund

Ridel, Deborah P00049730			Maiden name: Deborah Epperly Prosp.manager: Heidi McCrory			Class: 1957	
Donor codes: ALB; ALUM; BDDF; FSFR							
101 Jefferson Mountain Drive Newhaven VA 22727			(PR ) Mrs. Stanley Ridel Phone: ( 540 ) 123-4567			Type: PR	
<u>Fisc</u>	<u>Campaign</u>	<u>Designation</u>	<u>Outright Gift</u>	<u>Pledge Made</u>	<u>Pledge Pmt</u>	<u>Total Giving</u>	<u>Total Received</u>
2009	AF09	AFSBCNEEDS	\$0	\$2,500	\$1,250	\$2,500	\$1,250
2009	AR09	FDBETSY	\$100	\$0	\$0	\$100	\$100
<b>Donor total*:</b>						<b>\$2,600</b>	<b>\$1,350</b>

\* - All anonymous gifts are excluded from the report

## Codes and Definitions

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- 🌸 **ID# (or P-number):** The unique ID number used to identify each person listed in the Banner database.
- 🌸 **Solicitation Code:** The 8-character code used to determine the response to each mailing (for office use only).
- 🌸 **Donor Category Codes:** The code that identifies the various relationships to the College:
  - Each individual can have one or more Donor Category Codes associated.
  - The most common include:
    - **ALUM** (alumna)
    - **ALND** (alumna non-degreed)
    - **PARC** (Parent of Current Student)
    - **PARF** (Parent of Former Student)
    - **BDDF** (Former Board Member)
    - **BDD** (Board Member)
    - **ALBD** (Alumnae Board Member)
- 🌸 **Campaign Designations:** This code identifies the type of each gift and how it is designated. Annual Fund gifts always begin with “AF,” followed by the fiscal year in which the gift is credited.
  - Each person can appear on your solicitor report with multiple gifts (some restricted and some not).
  - The gifts show by designation, so a new line appears for each new gift to a designation.
  - The designations show in the solicitor report under the **Campaign** and **Designation** headings under each person’s name. The most common seen includes:
    - **AF12** (2012 Fiscal Year Annual Fund Unrestricted Gift)
    - **AR12** (2012 Fiscal Year Restricted Gift such as Friends gifts)
    - **20XXX** (***Our Campaign For Her World*** restricted gift – there are several designations used for the last campaign, but they all begin with “20” followed by 3 characters)
    - **AFSBCNEEDS** (or anything with “AF” in the beginning for one of the designations described on your Overview of the Annual Fund page)
    - **FDFOA** Friends of Art, **FDFOF** Friends of Library, and **FDFOATH** Friends of Athletics (gifts to Friends programs, which are restricted gifts and do not count toward Reunion class totals.)
    - **BATH** (Fitness and Athletic Center restricted gift)



## Exclusion Codes

Code	Description
CAI	Campus address is incorrect
ECO	Email contacts only from Dev
FSO	Fall solicitation only
NAL	No acknowledgment letters
NAM	No Alumnae Magazine
NCM	No alumnae club mailings
NCN	Do not use combined name
NFS	No Friends solicitations
NHR	Exclude from online Honor Roll
NNC	No networking contact
NOC	Exclude from all contact
NOE	Exclude from all email contact
NOS	Exclude from all solicitation
NPC	Exclude from phone contact
NPG	No Planned Giving mailing
NPL	No pledge reminders lifetime
NPR	No pledge reminders this year
NRC	Exclude from all receipts
NSE	No solicitation emails
NTB	No alumnae tour brochures
OOS	Only one solicitation
PDD	Parent has deceased daughter
PDL	Parent has multi. daughter, 1 dec.
PSL	Exclude from presidential search
SH	Husband of constituent
SPM	Spring solicitation only

Code	Description
SPR	Spring pledge reminder only
SW	Wife of constituent
TNS	Temporary no solicit



**Exclusion Codes:** Exclusion codes identify a constituent with a specific request.



**Example:** If a constituent is listed as NOS, the College will not solicit either by mail or Phonathon. Classmates are allowed to contact at their discretion.



**Note:** If contacting a constituent with exclusion codes, be mindful of his or her request, and be aware that the constituent may not welcome your contact.



## Annual Giving Website and Banner Self-Service

The Annual Giving website offers several features to make your role as a volunteer more efficient and much easier. The website features current and important information, and there is a volunteer portal to Banner Self-Service so volunteers can see results for a class or assigned classmates. Both giving and contact information can be accessed through Volunteer Reports.

New in 2012, the Annual Fund's website has been redesigned along with the rest of the College's web presence for a new and coherent look and to combine the functions of the Alumnae and Development Offices.

Go to the Annual Fund website (<http://www.sbc.edu/alumdev/boxwood-circle>), and click on the "Banner Self Service" link.

**SWEET BRIAR COLLEGE**

ABOUT ACADEMICS ADMISSIONS STUDENT LIFE ATHLETICS ALUMNAE NEWS & EVENTS GIVING RIDING

# alumnae and development

**Boxwood Circle**

**Annual Fund**

- Boxwood Circle
- Families
- Phonathon
- Reunion Giving
- Senior Class
- Young Alumnae

**Banner Self-Service Link**

**Boxwood Circle**

Leadership giving at Sweet Briar has a long and distinguished history beginning in 1960 when Gladys Wester Horton '30, Elizabeth Bond Wood '34 and Nancy Dowd Burton '46 together decided they wanted to raise alumnae giving to a new level and founded the Boxwood Circle Giving Society.

In the 50 years since, the Boxwood Circle has grown to recognize supporters who give \$2,500 or more to the College and include both matching gifts. We have been added, the to recognize support actively.

The leadership giving program encourages a strong connection between society members and the College and recognizes supporters for their extraordinary commitment to Sweet Briar. In addition to being recognized in the Honor Roll of Donors, members receive the Boxwood Circle newsletter twice a year and invitations to special events on and off campus.

**Join the Boxwood Circle, Fountain Society or Column Society today.**

**Login to Banner Self-Service, the Volunteer Portal.**

**Jane Reeb Short '74**  
2011-2012 Boxwood Circle Chair

*"In addition to giving me a great education,*

**Log in with your personal Username and Password.** Please contact **Sarah Lewis** ([slewis@sbcc.edu](mailto:slewis@sbcc.edu)), in Alumnae and Development, to request a user ID and password, if you do not already have one.

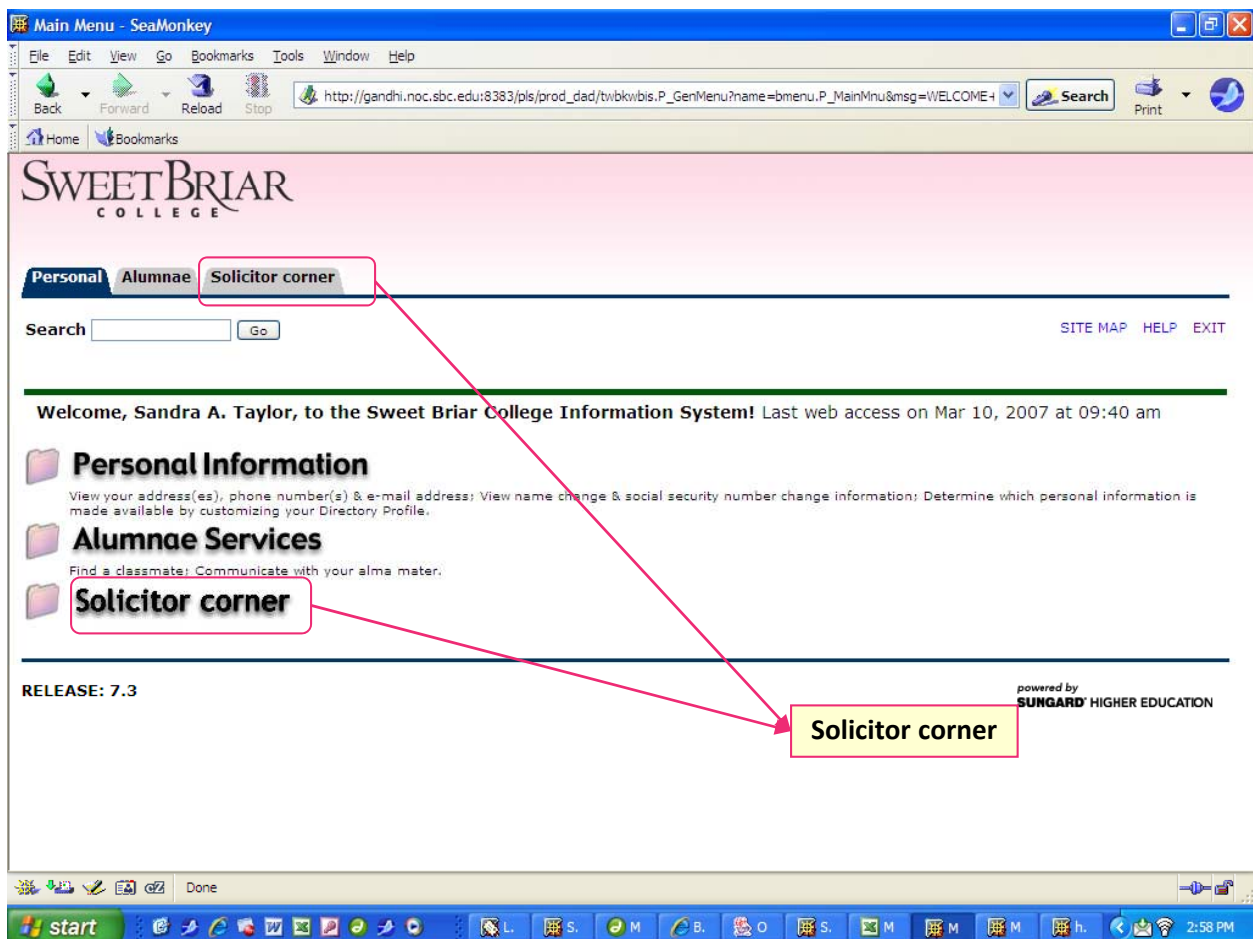
## Annual Giving Website and Banner Self-Service

### To access your reports:

1. Log in using your **Username** and **Password**.
2. Click on the **Solicitor Corner** link.
3. Click on the **Reports for Solicitors** option. (You can find copies of the training manual and other helpful documents under the **Info for Solicitors** option).
4. Choose **List of all constituents associated with a solicitor**. This will show those people assigned to you. There will be other options available for Chairs and Co-Chairs to also view the entire class.
5. Click the **Submit** button to initiate the report.

**Please Note:** Because the reports run in real-time to give you the most up-to-date information, it can sometimes take upwards of 5 minutes to run the report. Do not worry if it does not appear immediately. Your computer has not frozen. When the report is finished, it will open in a new window as a PDF document.

Use the **Solicitor corner** to view many useful documents updated daily for the latest information.



Choose the **Reports for Solicitors** link in the **Solicitor Corner** to view your Volunteer Reports any time day or night.

## Helpful Telephone Numbers

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Name/Contact	Role	Telephone	Email
Jane <i>Reeb</i> Short '74	Boxwood Circle Chair	757-640-1278	janeshort525@aol.com
"Missy" <i>Gentry</i> Witherow '80	Dir. of Boxwood Circle Giving	434-381-6272	mwitherow@sbc.edu
Connor Forren	Dir. of Development	434-381-3479	cforren@sbc.edu
Terry Nash	Dir. of Reunion & Parent Giving	434-381-6372	tnash@sbc.edu
Kate Gorman '11	Asst. Dir. of Ann. Giving	434-381-6299	kgorman@sbc.edu
Elise Stine '11	Asst. Dir. of Ann. Giving	434-381-6168	estine@sbc.edu
Sarah Lewis	Annual Giving Admin. Asst.	434-381-6373	slewis@sbc.edu
English <i>Griffith</i> Koontz '95	Annual Fund Chair	540-955-1758	english.koontz@mssb.com
Vivian <i>Yamaguchi</i> Cohn '77	Reunion Giving Chair	847-501-3611	vcohn@cug.com
Kathleen <i>Wilson</i> Wissel '06	Young Alumnae Giving Co-Chair	502-472-6661	kathleen.wilson22@gmail.com
William and Deborah Booth '13 Wendy Hansbrough '13	Parent Steering Committee Co-Chairs	727-785-7723 858-240-7164	bbooth1955@yahoo.com whansbrough@msn.com
Toll-Free Number	Alumnae Office	800-381-6131	Or locally 434-381-6131
Toll-Free Number	Development Office	888-846-5722	Or locally 434-381-6131
Melissa Coffey Gay '98	Dir. of Alumnae Relations	434-381-6243	mgay@sbc.edu
Dinah Watson	Asst. Dir. of Alumnae Relat.	434-381-6318	dwatson@sbc.edu
Donna Dodd	SBC Alumnae Office Assistant to the Director	434-381-6131	ddodd@sbc.edu
Toll-Free Number	Admissions Office	800-381-6142	
Cyndi Fein	Dean's Office	434-381-6415	cfein@sbc.edu
Karen Summers	President's Office	434-381-6210	ksummers@sbc.edu

## Notes

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