

West Point

ASSOCIATION OF GRADUATES



CLASS GIVING VOLUNTEER HANDBOOK

2019





You Are Part of a Tradition

Dear Class Giving Volunteer,

Thank you for agreeing to serve as a Class fundraising volunteer. The West Point Association of Graduates appreciates your dedication to your Class and the Academy, and we will make every effort to ensure that the experience is rewarding for you. Volunteers like you make a significant, positive impact on West Point and the Corps of Cadets.

As a fundraiser, it is important that you know what Class funds support, why the support is needed, and how to ask for this support. We have created this handbook to give you a comprehensive understanding of these three fundraising fundamentals. We hope you find this information useful.

If you have any questions, please let us know.

Again, THANK YOU for volunteering to lead your Class in a successful fundraising effort!

A handwritten signature in black ink that reads "Elena Ivanova".

Elena Ivanova '99

Director of Class Giving

A handwritten signature in black ink that reads "Kristin E. Sorenson".

Kristin E. Sorenson

Vice President of Development



Table of Contents

Overview: Class Reunion Gift Campaigns	7
Fast Facts: Class Reunion Gift Campaigns.....	9
Responsibilities: WPAOG Class Giving Staff	11
Responsibilities: Class Leaders and Volunteers	12
Soliciting a Class Gift.....	14
Dealing with Objections	17
Communications: Sample Fundraising Email	18
Communications: Sample Fundraising Letter	19
Communications: Sample Honor Roll	20
Communications: Sample Pledge Card	21
Research: Class Giving Donor Pyramids	23
Ways to Give.....	24
Reporting: Class Giving Reports (CGRs)	27
Frequently Asked Questions	28
Class Gift Recognition	32
Contact Us	33
Notes.....	34

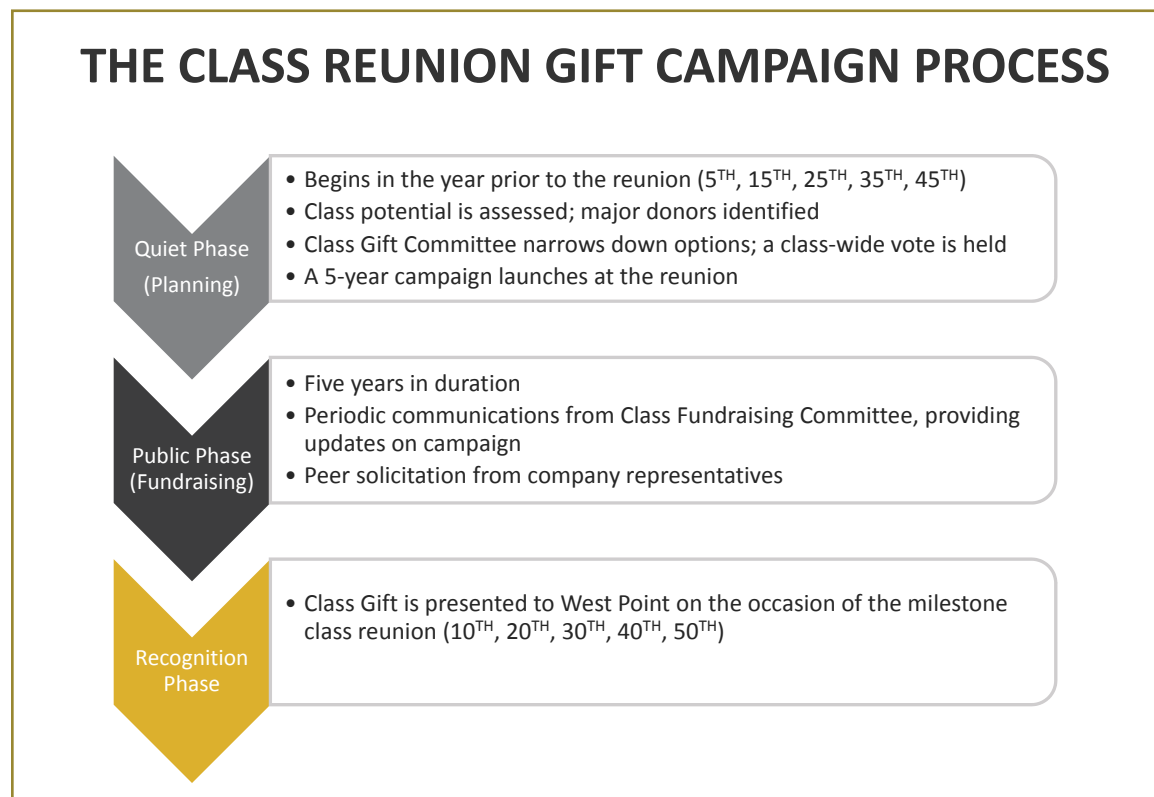


Overview: Class Reunion Gift Campaigns

Class Reunion Gifts are traditionally presented on a repeating 10-year cycle (10th, 20th, 30th, 40th, 50th Reunions). WPAOG's Class Giving (CG) office assists the Class President and the Fundraising Chair in designing a campaign in which the Class raises funds for the Class Reunion Gift. Potential gift targets from the Superintendent's Approved Needs List are shared with the Class by the CG office. CG works with the Class' Gift Selection Committee to narrow the needs to several choices of widest appeal to the Class. Then, after a Class vote is held, the campaign is launched publicly with the Class. During the active campaign, the CG office works closely with the Class leaders and campaign volunteers in reaching the financial goal set by the Class. At the reunion, the Class Reunion Gift is formally presented to the Academy and a fund transfer is made.

Funds donated to the Class Reunion Gift make up only one component of a larger entity called the **Class Reunion Giving Total**. This total includes the financial support given by classmates to all Academy funds over the previous five years—a true measure of how alumni support West Point. In addition to gifts made specifically to the Class Gift Fund, Class Reunion Giving also encompasses gifts to the Superintendent's Annual Fund, Long Gray Line Fund, Army Athletics, and other programs at West Point.

At your reunion, your Class will be recognized for its Class Reunion Giving Total, as well as for the Class Reunion Gift. The Class Reunion Giving Total will be announced and the Class Reunion Gift will be recognized via a check presentation to the Superintendent by the Class President and/or the Class Fundraising Chair. Additionally, depending on the nature of the Class project, the gift may be recognized on a plaque or with a naming opportunity.





Fast Facts: Class Reunion Gift Campaigns

- ▶ The Class Reunion Gift is selected by the Class from **the Superintendent's Approved Academy Needs List**. A vote is held, allowing each classmate to submit their choice. The option (or options) that garners the most votes becomes the Class Gift. Once the Class Gift is selected by the Class, the fundraising phase of the campaign commences.
- ▶ At West Point, the United States government continues to provide federal funding for “core needs” such as classroom curriculum, military and physical training, and basic facilities in which to conduct these programs. Private support provides the **Margin of Excellence**, which allows the Academy to remain one of the top undergraduate institutions in the nation and ensures that cadets develop to their greatest potential. Examples of Margin of Excellence items include:
 - ▶ Out-of-classroom leadership opportunities for cadets
 - ▶ Cultural immersion experiences for cadets
 - ▶ Club and athletic team support for cadets
 - ▶ Renovations and improvements to West Point (the Landmark)
 - ▶ Academic research centers for cadets, the U.S. Army, and the nation
- ▶ West Point is competing with other top-tier universities for the highest caliber candidates throughout the country. In the context of this competition, Margin of Excellence programs help attract the best possible candidates to become West Point cadets and future leaders of the Army and our nation.
- ▶ In recent years, 33% of all West Point alumni support the Academy through philanthropic gifts each year.
- ▶ The Long Gray Line has a history of giving, not only to our nation and the military, but to West Point. The members of every Class can have an impact on those who come after them by giving back to West Point.

Recommended Gift Targets (over 5 years)

10th Reunion:	\$250,000 to \$500,000
20th Reunion:	\$500,000 to \$750,000 or
25th Reunion:	\$750,000 to \$1,000,000
30th Reunion:	\$1,000,000 to \$1,500,000
40th Reunion:	\$1,500,000 to \$3,000,000
50th Reunion:	\$1,250,000 to \$2,500,000



Responsibilities: WPAOG Class Giving Staff

Fundraising Consultation

- ▶ Provide fundraising guidance and advice for Class campaigns
- ▶ Present Superintendent's Approved Academy Needs List to the Gift Selection Committee
- ▶ Attend and coordinate project meetings on the Class' behalf
- ▶ Provide assistance for reunion briefings
- ▶ Provide relevant historical Class giving information (i.e., participation rates, largest Class gift size, etc.)

Gift Vote

- ▶ On behalf of the class leadership, set up an online voting site with gift options
- ▶ Tally up the votes and communicate the gift choice to the class leaders

Research

- ▶ Analyze the gift potential of the Class
- ▶ Provide customized research on top prospects
- ▶ Provide a customized gift pyramid for the entire Class

Communication

- ▶ Develop fundraising letters for the Class
- ▶ Send email messages to the Class through the listserv
- ▶ Mail Class letters, ballots, and brochures
- ▶ Set up a designated online donation page for the Class campaign
- ▶ Send out thank-you letters to donors (through WPAOG's Development Office)

Reporting and Analysis

- ▶ Maintain Class database file
- ▶ Provide monthly reports on Class Reunion Gift campaign progress to Class Fundraising volunteers who have signed a confidentiality agreement with WPAOG
- ▶ Provide Lifetime Giving Reports to determine gift potential and reunion giving total recognition

Gift Processing

- ▶ Send out payment reminders to ensure pledges are fulfilled
- ▶ Send out tax receipts to donors (through the Gift Operations Office)

Recognition

- ▶ Coordinate gift presentation with DAA/USMA
- ▶ Coordinate Class Gift recognition with MHMC/USMA/WPAOG Stewardship Office
- ▶ For Class endowment gifts, send out annual stewardship reports to the Class President

Responsibilities: Class Leaders and Volunteers

Class President

- ▶ In cooperation with the Class Giving office, develops overall timeline for the Class Reunion Gift campaign
- ▶ Is responsible for recruiting a Gift Selection Chairman and Fundraising Chairman
- ▶ Receives advice on gift selection from Gift Selection Committee
- ▶ Announces the Class fundraising goal and campaign launch to the Class
- ▶ Communicates with classmates regularly and keeps them informed of campaign progress
- ▶ Reviews campaign status reports from Class Giving office
- ▶ Presents gift to the Superintendent at Class Reunion (10th, 20th, 30th, 40th, 50th)
- ▶ *Is a major contributor to the Class Reunion Gift*

Gift Selection Chair

- ▶ Recruits members of the Gift Selection Committee
- ▶ Recommends timeline for Committee's work
- ▶ With the Class Giving office, reviews the Approved Academy Needs List and discusses gift options with the Gift Selection Committee
- ▶ Oversees Committee in choosing several gift options for Class vote
- ▶ Coordinates plan for Class vote(s) with Class Giving office and Gift Selection Committee
- ▶ Coordinates plan for gift announcement with Class Giving office and Gift Selection Committee
- ▶ Provides Class Giving office with After-Action Report at conclusion of Class campaign
- ▶ *Is a major contributor to the Class Reunion Gift*



Class Fundraising Chair

- ▶ Works with a WPAOG Class Giving Officer to develop a fundraising strategy and timeline for fundraising campaign
- ▶ Creates and oversees execution of fundraising plan
- ▶ Reviews the Class gift pyramid, as provided by WPAOG, and develops viable gift target
- ▶ Develops comprehensive major donor strategy (peer-to-peer solicitation) using the gift pyramid, lifetime giving report, and classmates' knowledge
- ▶ Selects company representative subcommittee (good practice)
- ▶ Develops comprehensive communication strategy (email, direct mail, telephone)
- ▶ Communicates with and motivates Class volunteers on regular basis
- ▶ Monitors giving progress and provides company reps with their respective portion of the Class Giving Reports (CGRs)
- ▶ Provides the Class Giving office with After-Action Report at conclusion of the Class campaign/ participates in end of campaign survey
- ▶ Maintains confidentiality with all giving and contact information for classmates
- ▶ *Leads fundraising campaign by example, making a leadership gift to the Class Reunion Gift*

Class Volunteers/Company Reps

- ▶ Contact and solicit all members of their respective cadet companies
- ▶ Understand the Class Reunion Gift project and convey to classmates the various methods to contribute
- ▶ Lead company by example, but understand that participation and thoughtful, proportionate giving are most important
- ▶ Receive and compare reports to individual records based on communication with classmates
- ▶ Maintain confidentiality with all giving and contact information for classmates
- ▶ *Contribute to the Class Reunion Gift*



Soliciting a Class Gift

1. Make your own gift first

Once you have made your own commitment, it is easier to ask others to do so.

2. Do not be embarrassed to ask

We have all benefited from the outstanding education and leadership training we received at West Point. Now is the time for us to do our part and give back to our alma mater. If you believe in West Point and its mission, asking classmates to support the Academy is easy.

3. Remember, you are not asking for yourself, but for West Point

Most alumni benefited from excellent facilities and programs, which were fully funded by government allocations and very few private gifts. The situation has changed. Today, the Academy is dependent on alumni and the private sector to support the quality for which West Point is known. Future Classes will be asked to take on even greater challenges, so your example today will set the future standard.

4. Know the project (or projects)

Believing in your cause starts with understanding it. Read the materials that were provided to you when your Class chose the project(s). Ask questions if you have unresolved issues. If your classmates ask questions that you can't answer, don't be embarrassed. You don't have to be an expert. Just ask the WPAOG Class Giving office and get back with your classmate as soon as possible.

5. Be comfortable

Think of the reasons that resulted in your decision to make a gift to West Point; others will probably give to West Point for those same reasons. You shared memorable moments, Academy traditions, and hard work through good and bad times. You pulled together as a team. Now you have an opportunity to work together again towards a tremendously worthwhile goal. It is a deeply rewarding experience when you come together at your milestone reunion and present your Class Reunion Gift to the Academy.

6. Try to reach each classmate personally by telephone or through a face-to-face meeting

If a classmate is simply impossible to reach, even after several tries, put it in writing. *But, remember that fundraising success increases dramatically with personal contact.* Do your best to reach each classmate personally.

7. Be up front about the reason for the call

Let them know right away that you are calling for help in supporting the Class Reunion Gift with a contribution. If it is not convenient for them to talk at that time, offer to call back.

8. Ensure that everyone has received at least one letter, pledge card, and envelope

If they have misplaced the materials, offer to send another pledge card and envelope, but take the immediate opportunity to discuss your Class project and seek a commitment.

9. Approach your best prospects first

Approach your best prospects first—nothing feels better than a little success at the beginning—but give each classmate your best effort.

10. Emphasize pledge payment options

Pledges may be paid monthly, quarterly, semi-annually, or annually with cash, check, credit card, or corporate stock (see Ways to Give section).

11. Offer to call again

Your classmate may want time to consider the gift or to discuss it with his or her spouse. Schedule a time for a follow-up call.

12. Practice

Practice your calls with a friend or family member to increase your comfort level.

13. Listen to the person whom you're calling and think about a good level of support

Some of your classmates have already made major contributions (that is, \$100,000 or more), and you will be asking them to consider a benchmark gift before your next reunion. Some can outdo previous gifts, others may not. Indicate that you stretched to make the most appropriate gift for you and your family, and that you would like them also to consider the best and most appropriate level for them and their families. This will influence classmates to do their very best.

14. Ask about Corporate Matching Gifts

Remember to emphasize that many corporations match charitable gifts. Ask each classmate to contact his or her human resources office for more information, or go to WestPointAOG.org/matchinggift.

15. Check *Howitzer* for background on classmates

It may help to quickly review the different activities in which your classmates were involved. Remembering that someone was in the Glee Club or on the Hop Committee may just help the conversational flow.

16. At times, people refuse to make a gift

Do not feel that you have been personally rejected. If their reason for refusing to make a gift is based on an unpleasant experience having to do with West Point, WPAOG would like to know about it. Please contact the WPAOG Class Giving office at 845.446.1656.



Dealing with Objections

“I gave last year.”

“Like at all institutions, annual support is critical, and your gift is appreciated. However, our Class Reunion Gift is something entirely separate from the Annual Giving effort. Would you continue your support with a gift of \$____ to the Class Reunion Gift?”

“I support other West Point programs.”

“Since this is our Class Reunion Gift, and we as a Class would like to have maximum participation, we hope we can count on your help at a level that is manageable for you. Would a gift of \$____ work for you?”

“The amount I can give is so small it probably wouldn’t help much.”

“Every gift is important and very much appreciated. Your pride in the Academy shows by the fact that you are supporting your alma mater. Every gift helps support West Point programs. Your gift at any level is very important and will add to our Class’ participation rate!”

Suggested Answering Machine Scripts

After first few attempts: “Hello, this is **(your name)**. I am calling regarding our Class Reunion Gift and would appreciate a few moments of your time. I will try to reach you again in the next day or so. I look forward to talking to you soon.”

Final attempt: “Hello. This is **(your name)** calling for **(name of classmate)**. I haven’t been able to reach you in person so I’d like to let you know that I’m asking for your support for our Class Reunion Gift. Our Class goal for our ___ reunion is \$____. We’re calling Class members for pledges towards this ambitious goal. It would be wonderful if we could count on you to make a gift. Any amount makes a positive difference to the Academy. If you want to get in touch with me, my phone number is____. I will mail you a pledge card, but you also can contact the Class Giving office directly at 845.446.1656. Thank you for your consideration.”

Communications: Sample Fundraising Email



Class of XXXX United States Military Academy

Dear Classmates,

It has been six months since the launch of our fundraising campaign and I wanted to provide you with an update. Our goal is to raise a total of **\$1,000,000 by fall 2021** in support of the **Class of XXXX Academy Scholars Endowment**.

As of June 1, 2017, we have **\$500,000** committed to our Class Gift Campaign. We are off to a solid start and together we can achieve this goal!

For those who haven't yet had the chance to participate: you may want to consider making a monthly or quarterly gift, which can increase your overall contribution to our class gift by spreading payments over the next four and a half years. All donations are tax-deductible to the fullest extent allowed by law. Please make your commitment online at www.westpointaog.org/givetoXX.

Participation is key!

[CLICK HERE](#) to see a list of all who have donated to our Class Gift Campaign as of 6/1/2017. If you have already donated, THANK YOU!

I will continue to provide periodic updates on our progress. Thank you for all you are doing to help us meet our goal.

Sincerely,

Name
Class of XXXX Fundraising Chair

Matching Gifts: Many employers will match charitable contributions made by their employees and, sometimes, retirees or spouses. These programs can double – or even triple – the size of your gift and are fully credited to you and your company! Instructions on how to apply for the match is available on the WPAOG website at www.westpointaog.org/matchinggift.

Gifts of Stock or Mutual Funds: Stocks and securities are accepted as charitable contributions and, in some cases, there may be considerable tax benefits for this type of contribution. For more information, please contact 845-446-1658 or Marion.Schaefer@wpaog.org.

Communications: Sample Fundraising Letter



Class of XXXX United States Military Academy

Spring 2017

Dear Classmates,

It has been six months since the launch of our fundraising campaign and I wanted to provide you with an update. Our goal is to raise a total of **\$1,000,000 by fall 2021** in support of the **Class of XXXX Academy Scholars Endowment**.

As you can see from the tally on the right, we have **\$500,000** committed to our Class Gift Campaign. We are off to a solid start and together we can achieve this goal!

For those who haven't yet had the chance to participate: you may want to consider making a monthly or quarterly gift, which can increase your overall contribution to our class gift by spreading payments over the next four and a half years. All donations are tax-deductible to the fullest extent allowed by law. You may complete the enclosed pledge card and send it in, or make your commitment online at www.westpointaog.org/givetoXX. **Participation is key!**

On the back of this page is a list of all who have participated in our campaign as of 6/1/2017. If you have already donated, THANK YOU!

I will continue to provide periodic updates on our progress. Thank you for all you are doing to help us meet our goal.

Sincerely,

Name
Class of XXXX Fundraising Chair

Matching Gifts: Many employers will match charitable contributions made by their employees and, sometimes, retirees or spouses. These programs can double – or even triple – the size of your gift and are fully credited to you and your company! Instructions on how to apply for the match is available on the WPAOG website at www.westpointaog.org/matchinggift.

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Class of XXXX
as of 6/1/2017

Dollar Goal:
\$1,000,000

Current Alumni
Participation:
33%

Total Amount
Committed to Date:
\$500,000

Cash Receipts:
\$200,000
Outstanding Pledges:
\$300,000

Communications: Sample Honor Roll



Class of _____ Honor Roll

Donors to the Class of _____ Gift Fund from _____ through _____



A1

CPT Beast Barracks, USA
Mr. Benny Havens
Ms. Stony Lonesome
MAJ Michie Stadium, USA
Participation 20%

B1

Ms. First Captain
GEN Hell Cat, USA
Dr. Thayer Hall
Mr. Reconciliation Plaza
Participation 18%

C1

Ms. South Dock
Mr. Class Treasurer
Participation 5%

D1

CPT Christl Arena, USA
COL Graduation Day, USA
Mr. Tate Rink
Participation 9%

E1

MAJ North Dock, USA
LTC Thayer Gate, USA
Mr. Grant Monument
Participation 8%

F1

Mr. Acceptance Day
Dr. Flirty Walk
Participation 8%

G1

Ms. Company Commander
BG Herbert Hall, USA
2LT The Plain, USA
MAJ Class Secretary, USA
Participation 20%

H1

Mr. Dwight Eisenhower
Dr. Hotel Thayer
Participation 10%

I1

Mr. Martin Maher
MG Sink Navy, USA
Participation 9%

A2

Ms. Camp Buckner
Ms. Glee Club
Mr. Bartlett Hall
Participation 15%

B2

2LT Thayer Award, USA
Ms. Grant Hall
GEN Ike Hall, USA
Dr. Washington Monument
Participation 21%

C2

Ms. Central Area
CPT Mahan Hall, USA
Dr. Buffalo Soldier
Participation 14%

D2

1LT Battle Monument, USA
MAJ Thayer Walk, USA
Participation 9%

E2

LTC Dress Mess, USA
Ms. Sally Port
Participation 10%

F2

GEN Go Army, USA
1LT Nininger Award, USA
Ms. Margaret Corbin
Participation 15%

G2

Mr. River Courts
LTC Old South, USA
Participation 10%

H2

Mr. Bugle Notes
Ms. Crandall Pool
LTG Trophy Point, USA
Participation 15%

I2

Ms. Constitution Island
COL Army Mule, USA
LTC Spirit Mission, USA
Participation 14%

A3

LTC Full Dress, USA
Mr. Washington Hall
2LT Class President, USA
Participation 15%

B3

Ms. Lake Frederick
MAJ Jefferson Hall, USA
Ms. Lusk Reservoir
Participation 14%

C3

Mr. Cullum Number
Participation 5%

D3

GEN Poop Deck, USA
LTC The Plain, USA
Participation 9%

E3

Mr. Service Cap
Ms. Taylor Hall
Participation 8%

F3

Mr. Quarters 100
MAJ Firstie Club, USA
BG Old Grad, USA
1LT Sosh Run, USA
Mr. Sylvanus Thayer
Participation 27%

G3

LTC Reception Day, USA
Ms. Shea Stadium
Participation 10%

H3

1LT Cadet Activities, USA
Ms. Full Bird
CPT Obstacle Course, USA
Mr. Long Gray Line
Participation 21%

I3

Ms. March Back
MG Rabble Rouser, USA
Participation 11%

A4

Ms. Spirit Band
MAJ Class Ring, USA
Mr. Hudson River
Participation 15%

B4

COL Black Knight, USA
Participation 6%

C4

BG Alma Mater, USA
Participation 5%

D4

Dr. Great Chain
MAJ Drill Team, USA
Participation 10%

E4

Mr. 2% Club
LTC Fort Putnam, USA
Mr. Rock Swimming
Participation 15%

F4

BG Tar Bucket, USA
Participation 5%

G4

Mr. Hayes Gym
2LT Hat Toss, USA
Participation 9%

H4

GEN Century Man, USA
Dr. Pointer View
Participation 10%

I4

CPT March On, USA
Mr. Class Reunion
2LT Thayer Week, USA
Participation 14%

Friends

Ms. Doubleday Field
Howitzer
Dr. Keller Hospital

Communications: Sample Pledge Card



CLASS OF 1982 40TH REUNION GIFT

DONOR INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____
(please specify if cell, home, or business)

Signature: _____ Date: _____

MY PLEDGE TO THE 40TH REUNION GIFT (PLEASE FULFILL PLEDGES BY SEPT 2022)

- | | | |
|---|--------------------------------|---------------------------------------|
| <input type="radio"/> \$82/mo. for 60 mo. (\$4,920) | <input type="radio"/> \$5,000 | <input type="radio"/> \$50,000 |
| <input type="radio"/> \$1,000 | <input type="radio"/> \$10,000 | <input type="radio"/> \$100,000 |
| <input type="radio"/> \$2,500 | <input type="radio"/> \$25,000 | <input type="radio"/> Other: \$ _____ |

Single Installment: _____ Gift date/year: _____ / _____

Multiple Installments: Start Month/Year: _____ / _____ # of Installments: _____

Installment Frequency: Monthly Quarterly Semi-Annually Annually

In Honor/Memory of: _____ Class: _____
(if applicable)

PAYMENT INFORMATION

Check (payable to WPAOG: Class of 1982 Gift Fund)

Automatic Credit Card Installments: Visa MasterCard American Express
occurs on or about the 15TH in the month due

Name on card: _____

Card number: _____ Exp. Date: _____ / _____

My company will match my gift! Company name: _____
visit www.westpointaog.org/matchinggift or call 845-446-1658 for more information

Please send me information on giving through: Stock/Mutual Funds Military Allotment

PLEASE RETURN THIS FORM TO:

West Point Association of Graduates · Office of Class Giving
698 Mills Road · West Point, NY 10996 · classgiving@wpaog.org
phone: 845-446-1656 · fax: 845-446-1693



West Point
ASSOCIATION OF GRADUATES



Research: Class Giving Donor Pyramids

The Class Giving office can provide Classes with a gift pyramid, which illustrates the number of donors needed at each gift size level in order to reach the Class' goal, given a target participation rate. The WPAOG Research office uses public information to assign classmates a giving capacity estimate for the different giving levels within the pyramid.

Gift Level	No. Gifts Required	No. Prospects Required	Total
\$100,000	1	4	\$100,000
75,000	1	4	75,000
50,000	2	8	100,000
38,000	3	12	114,000
25,000	4	16	100,000
20,000	5	20	100,000
10,000	10	40	100,000
5,000	12	48	60,000
2,500	14	56	35,000
Under 2,500	443	782	216,000
Totals	495	990	\$1,000,000

Illustrative Example for:

Class Gift Target: \$1,000,000
 Class Participation Rate: 50%
 Prospects to Solicit: 990

Ways to Give

Gifts and pledges to your Class Reunion Gift can be made in many ways including:

- ▶ Cash, checks, credit card, or electronic funds transfer
- ▶ Government allotment
- ▶ Stocks or mutual funds
- ▶ Donor-advised funds or foundations
- ▶ Corporate matching gifts

Payment can be made via:

- ▶ Online giving (credit card)
- ▶ Phone (credit card)
- ▶ Mail (checks, bank account, or credit card information accompanied by a pledge card)
 - Checks, payable to the “West Point Association of Graduates—Class of XXXX Gift Fund,” should be mailed to:
West Point Association of Graduates
Attn: Gift Operations
698 Mills Road
West Point, NY 10996

Credit Card Gifts

The West Point Association of Graduates accepts the following major credit cards: VISA, MasterCard, and American Express:

There are several ways to make a credit card gift:

- ▶ Call the Class Giving office at 845.446.1656
- ▶ Complete the necessary information on the provided pledge card and mail it back to the address listed on the card
- ▶ Donate online using the designated class giving link, as provided by the Class Giving office

Electronic Fund Transfer (EFT)

Donors may make their contributions monthly from a bank account by filling out the form found at the WPAOG website. Contributions will be automatically deducted from their bank accounts on or about the 15th of each month.

Government Allotment

Active duty and retired military may contribute via government allotment by filling out DD Form 2558 and turning it in to their local finance office. For detailed instructions on how to fill out the form, please visit our website at WestPointAOG.org/allotment.

Gifts of Stock or Mutual Funds

Stock and securities are accepted as charitable contributions. In some cases, there may be considerable tax benefits for this type of contribution. WPAOG has a broker and an account through which to receive these contributions. Please contact the WPAOG Gift Operations office at 845.446.1658 or giftoperations@wpaog.org.

Donor-Advised Funds or Foundation Gifts

Donors may recommend or direct gifts to “West Point Association of Graduates—Class of XXXX Gift Fund” through donor-advised funds or private foundations. Please contact the WPAOG Gift Operations office at 845.446.1658 or giftoperations@wpaog.org.

Charitable IRA Rollover

The Protecting Americans From Tax Hikes Act of 2015 includes a permanent extension of the charitable IRA rollover. Any gift made directly from an IRA to the West Point Association of Graduates will qualify as a rollover gift. Under the law, donors age 70½ or older who move up to \$100,000 from their IRAs directly to qualified charities during the calendar year will not have to pay income taxes on the gift. The gift will qualify toward their required minimum distribution, will not be subject to charitable giving limitations, and will not qualify for a charitable deduction.

Matching Gifts

Many employers will match charitable contributions made by their employees and, sometimes, retirees or spouses. These programs can double, or even triple, the size of your gift!

A database listing most, but not all, companies that match gifts, as well as instructions on how to apply for the match, is available on WPAOG’s website at WestPointAOG.org/matchinggift. While some companies do not require a form, others do.

If your company is eligible, request a matching gift form from your employer, and send it completed and signed with your gift to WPAOG. WPAOG staff will do the rest!

Please contact the WPAOG Gift Operations office at 845.446.1658 or giftoperations@wpaog.org.

Note: Your classmates’ pledges to your Class Reunion Gift should not include the anticipated matching gift portion; one’s pledge represents the intended out-of-pocket gift only. Matching gifts are recorded separately from out-of-pocket gifts, but indeed count towards both individual and class giving totals.



Reporting: Class Giving Reports (CGRs)

Class Giving Reports (CGRs) will be sent to the Class President and Fundraising Chair once per month while the class is actively in campaign. The report will be broken down by company so participation among classmates can be tracked.

IMPORTANT: Class Giving Reports are strictly confidential and for use by authorized recipients only. Distribution of giving and contact information by non-authorized persons is prohibited.

- ▶ **All volunteers receiving information about a donor's giving history must sign and date a form indicating that he/she understands and will abide by the WPAOG Policy for Release of Giving Information. Information will be provided after the signed document is received.**
- ▶ All ex-cadets, widows, and other individuals who made gifts to the current Class campaign will appear in the "Friends" section at the top of the report. They will not appear within the companies.
- ▶ Only living graduates will appear within the cadet company sections.

For deceased classmates:

- ▶ If a graduate passed away before the start of the Class campaign (as shown by the report timeframe), then he or she will not appear within his or her company for fundraising purposes.
- ▶ If a graduate passes away during the Class campaign, and he or she was a donor to the campaign, then he or she will continue to appear in the report as a campaign donor, but with a (D) next to the name (for "deceased").
- ▶ If a graduate passes away during the campaign and he or she was not a donor to that Class campaign, then the graduate will not appear within his or her company for fundraising purposes.

Please note that only donors who make a gift to the Class Gift Fund will receive the gift credit (i.e., donors cannot give on behalf of classmates to increase participation rates).

Frequently Asked Questions

How do I make sure that my gift gets allocated to my Class Reunion Gift?

To contribute to the Class Reunion Gift, just make sure to designate your gift to the Class of XXXX Gift Fund (e.g., if writing a check, make it out to “West Point Association of Graduates—Class of XXXX Gift Fund”).

Is my gift tax deductible?

The West Point Association of Graduates (WPAOG) is a tax-exempt organization incorporated under the laws of the State of New York. WPAOG is officially listed in the IRS Cumulative list of Exempt Organizations (IRS Publication 78) as an organization qualified for maximum deductibility. Gifts to WPAOG receive all of the income tax and estate tax benefits allowable under the law. The official title of WPAOG in the IRS Publication is “Association of Graduates of the United States Military Academy, West Point, New York.” Its Federal Identification Number is 14-1260763.

What is the start date of our class campaign?

All gifts received in the Class of XXXX Gift Fund since the class’ last reunion gift presentation will count toward the current class reunion gift. For example: if the Class of XXXX presented its 10th reunion gift on December 31, 2017, the campaign start date for the 20th reunion gift will be January 1, 2018.

Do corporate gifts count towards the Class Reunion Gift?

Corporations, with the exception of matching gifts, do not make gifts to Class Gift Funds. Class members should not solicit corporations to support their Class Reunion Gift.

WPAOG’s corporate and foundation giving office works with corporations and foundations that are interested in giving significant gifts to West Point programs and projects. Staff assist prospective grantors or sponsors in identifying specific gift projects that satisfy their charitable and marketing goals while fulfilling important West Point or WPAOG gift needs.

Do planned gifts count towards the Class Reunion Gift?

Only **realized** planned gifts, designated to the Class Gift Fund, (as a result of the death of a classmate prior to the end of the campaign) count. This is because the planned gift becomes a liquid asset available to the Academy when the gift is realized.

I’m confused: Superintendent’s Annual Fund, Long Gray Line Fund, Army Athletics, Parents Fund, Class Gift Fund. What are the different funds?

Alumni can designate their gifts to any Academy need that has been approved by the Superintendent.

The *Class Gift Fund* is a holding account where funds designated to a particular Class reside until the Class presents a gift to a selected Academy need. Gifts made to the Class Gift Fund are not disbursed to the Academy for immediate use, but remain in the fund until the Class directs a transfer to the Academy at its milestone reunion.

Gifts to the *Superintendent's Annual Fund* are unrestricted gifts for West Point. The Superintendent receives requests from all of the major directorates at the United States Military Academy for additional funding to support Margin of Excellence programs. Gifts to the Superintendent's Annual Fund are important gifts the Academy receives because they are used to "fill in the gaps" and fund current needs.

Gifts to the *Long Gray Line Fund* provide valuable operational support for WPAOG by funding existing programs for alumni and the Corps of Cadets. Programs include the Ring Melt and the 50-Year Affiliation Program, as well as communications from West Point, memorial services, Class and Society support, career services, and graduate archives—keeping graduates and friends connected to West Point.

Gifts to Army Athletics support Army's intercollegiate athletic teams. Each spring, graduates, parents, and friends of West Point are asked to make a gift in support of Athletics. Unless a donor restricts the gift to a specific team, these unrestricted donations will support all corps squad athletics.

The *Parents Fund* is a subset of the Superintendent's Annual Fund. This annual appeal is sent to non-alumni parents of current cadets to obtain valuable unrestricted support for West Point.

I heard that a "surcharge" is applied to gifts made to West Point through West Point Association of Graduates. Why?

WPAOG's Development office functions as the Academy's fundraising arm because military personnel and representatives of the Federal Government are prohibited by law from soliciting funds, goods, or services. WPAOG Development raises and receives gifts for West Point, which are then passed to the Academy. In return, the Academy assesses a Gift Allocation Percentage (GAP) on gifts received that pays for the fundraising staff and the expenses of Development. The GAP, which was lowered from 15% to 12% in 2011, is determined by a Memorandum of Agreement (MOA) between the Superintendent of the Academy and the Chairman of the Alumni Association. This MOA is reviewed at regular intervals. The average not-for-profit in the United States assess between 15% to 24% of each gift for operations.

The cost of fundraising for West Point via the WPAOG Development office is less than most major civilian colleges and universities, according to annual surveys done by CASE (Council for Advancement and Support of Education). However, civilian colleges' costs of fundraising are not usually transparent to their alumni and other donors. This is because the development offices' staff and budgets at civilian universities are part of the overall budget and not publicly reported. The GAP is required by West Point to ensure future fundraising success for the Academy.

My Class is raising money for a split gift (e.g., the Superintendent's Endowment and Long Gray Line Endowment). Can I support only one part of the Class Reunion Gift?

When a classmate gives to the Class Reunion Gift, they are supporting all facets of the gift project that the Class voted on. One cannot restrict his or her support to a portion of the gift.

Frequently Asked Questions

How do federal tax dollars and donor gift funds interrelate?

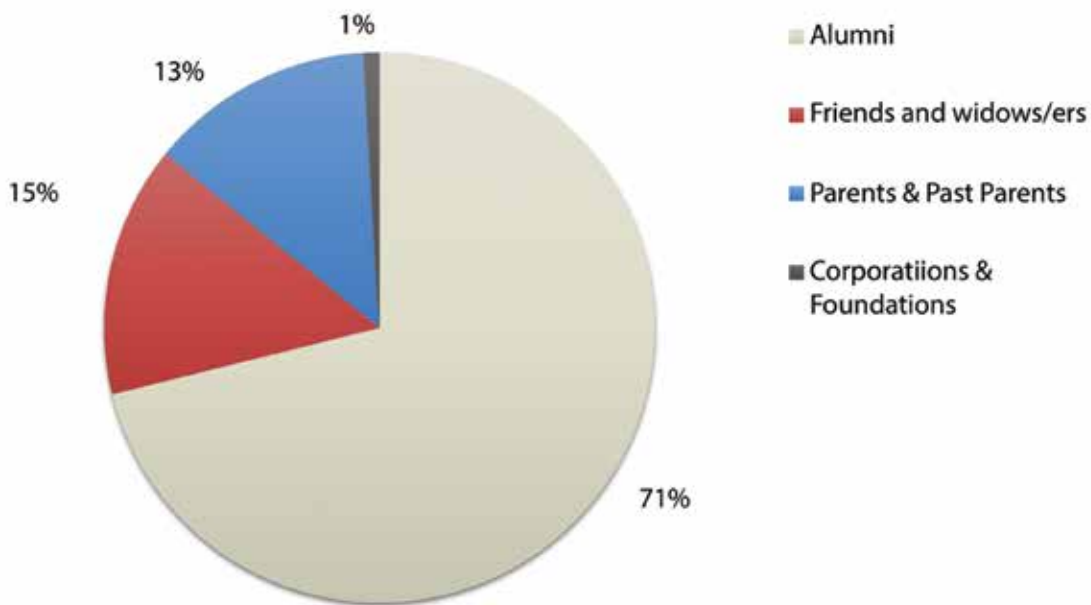
WPAOG's Memorandum of Agreement with West Point states that WPAOG will raise money for West Point needs "for which appropriated money is not available and is unlikely to become available." The Academy's private funding needs continue to grow substantially due to rising educational costs and decreasing federal funding.

Why do I get solicited so many times?

Solicitations for the Superintendent's Annual Fund, Long Gray Line Fund, A Club, and West Point Parents Fund are mailed throughout the year. Donors can designate their gifts to support other approved Academy needs such as your Class Gift Fund. If your Class is in a campaign, you will receive the letters that your committee members decide to send to you. If you played on a corps squad team, you might receive more solicitations through the Army Athletic Association.

What are the primary sources of private funds?

The source of gifts in 2017 are shown in the chart below.



How are gifts to West Point used?

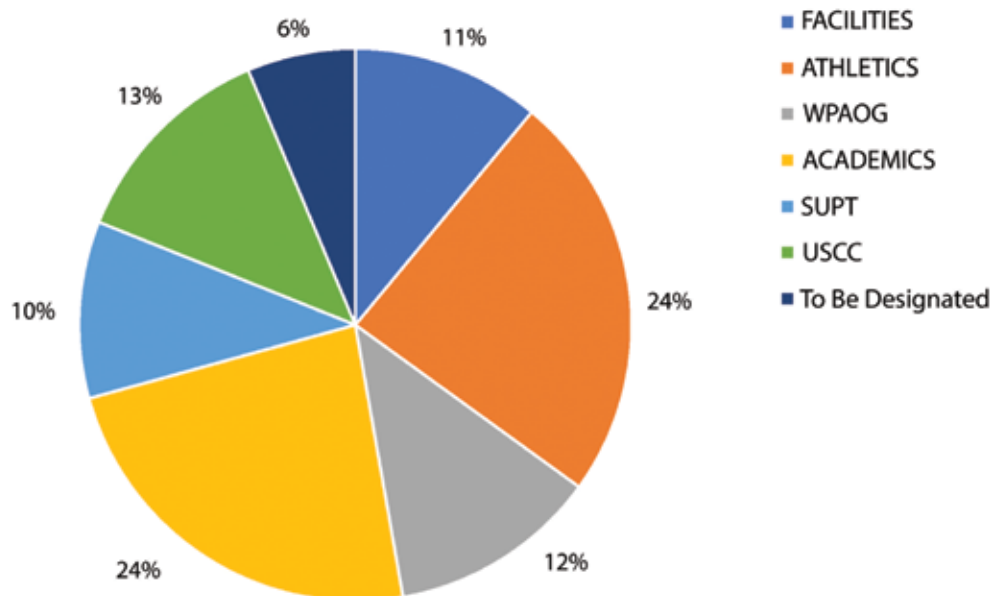
The United States Military Academy Superintendent determines all funding needs for the Academy and approves all gifts to West Point. These funding needs range from brick-and-mortar projects to academic, athletic, and club team endowments.

Unrestricted gifts are gifts to the Academy or the West Point Association of Graduates that are not designated for a particular use. These gifts are extremely important because they allow the Superintendent, or the President of WPAOG to prioritize needs and direct funds where they will be most useful.

Restricted gifts are gifts to specific projects and programs at West Point that can be used on an annual or multi-year basis.

Endowments fund specific programs in perpetuity.

Where Donors Directed Their Gifts in 2017



Class Gift Recognition

Naming and plaque recognition opportunities are a means to raise funds for West Point's **Margin of Excellence** programs and to elevate the culture of philanthropy for the Academy. They are also meant to recognize, on a long-term basis, the unique relationship between significant donors and West Point.

WPAOG follows the policies defined in USMA Reg. 1-4 Administration Memorialization and Recognition Programs. The following guidelines are set to establish minimum gift levels:

Endowment and Plaque Recognition Guidelines

- ▶ \$100K minimum for plaque recognition or creating/naming endowments
- ▶ \$500K minimum for naming brick and mortar spaces

Recognition Plaques

Academy approval: All plaques must be presented to the Museum, Historical, and Memorialization Committee (MHMC) for its recommendation for Superintendent approval.

Language: e.g. "In recognition of a gift given by _____"

Parameters:

- ▶ Unrestricted gifts can receive an individual plaque on a classroom, office, etc depending on gift amount
- ▶ No plaques will be given for named scholarships
- ▶ Plaques **may** be given for named endowments in certain circumstances, depending on the funded need

Important: The size of the recognition plaque will reflect the cash received by the reunion date. The gift recognition amount does not include outstanding pledges.

Gift Level	Size of Plaque
\$100,000	10" X 12"
\$250,000	12" X 14"
\$500,000	12" X 16"
\$1,000,000	16" X 16"
\$2,500,000	18" X 18"
\$5,000,000	18" X 22"
>\$10,000,000	24" X 24"

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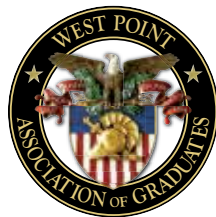
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Notes





West Point
ASSOCIATION OF GRADUATES

Serving West Point and the Long Gray Line