Rice Annual Fund volunteers play a crucial role by working with the Annual Fund to reach Rice’s annual fundraising goals. This handbook includes information to support you with your fundraising efforts and in talking with your peers about giving to the Annual Fund.

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Volunteers are the foundation of the Rice Annual Fund.

For many years, volunteers have played a critical role in assisting the university by building relationships with their peers. Our supporters tell us that they have many reasons for giving to Rice. Some feel a deep sense of gratitude to Rice for the excellent education they received. Many wish Rice to continue its rise as a research university of national and international prominence. Others tell us they want to support the overall mission of the university. There are also those who give simply because they were asked to do so by a peer.

As an alumnus, parent, student, faculty, or staff volunteer for the Rice Annual Fund, you are a facilitator between the university and your peers. Because you share a common Rice experience, you are in a unique position to assist in building and maintaining these relationships between the university and your peers. Volunteering is also a great way to stay connected to the Rice community and to learn firsthand about Rice’s new and exciting educational endeavors.

Through volunteer engagement, the Annual Fund assists the university in continuing to achieve its goals to provide:

- scholarship support for hundreds of undergraduate students each year.
- fellowship support that allows the university to attract the highest-caliber graduate students.
- support for programs that create distinctive, multi-faceted research and outreach experiences for students.
- support for the programs that energize and sustain residential college life, which is the cornerstone of the student experience at Rice.

Our staff looks forward to working with you in your role as an Annual Fund volunteer. I trust that you will find it to be a rewarding experience. From all of us here at the university, thank you for all that you do for Rice!

Darrow Zeidenstein, Ph.D.
Vice President for Development and Alumni Relations
About the Rice Annual Fund for Student Life and Learning

The Annual Fund is the university’s most powerful giving program. Each year, more than 64 percent of Rice alumni, parents, students, and friends who give to Rice do so through the Rice Annual Fund, the university’s most powerful vehicle for unrestricted giving. Its sole purpose is to support student life and learning. Year after year, the Annual Fund delivers financial resources to support scholarships, graduate student support, residential college life, library resources, and a range of initiatives that otherwise might not be funded. A gift to the Annual Fund is the best way to ensure that current and future students receive the most rewarding Rice experience possible.

Tuition and endowment income are Rice’s main sources of operating revenue but cover only part of the expense to operate the university. Gifts to the Rice Annual Fund provide essential support for bridging that gap. Further, unrestricted gifts are a source of strength and flexibility for Rice, especially during times of economic uncertainty when less of the endowment is available for distribution.

Rice’s fiscal year: July 1 – June 30

The Rice Annual Fund raised $7.7 million in fiscal year 2015 to support the student experience.
Areas of Support

UNDERGRADUATE SCHOLARSHIPS
The Rice Annual Fund provided nearly $4.9 million to support undergraduate scholarships.

GRADUATE STUDENT SUPPORT
$503,00 was provided by the Rice Annual Fund in support of graduate students.

CAMPUS BEAUTIFICATION
Rice maintains more than 4,000 trees on campus. The Rice Annual Fund supported approximately $95,000 of the nearly $850,000 annual expenditure on landscaping.

LIBRARY RESOURCES
Each year, the library purchases an estimated 36,000 books and 11,500 serial subscriptions and online services, which cost nearly $9.5 million. The Rice Annual Fund supported $1,050,000 of this total.

RESIDENTIAL COLLEGE LIFE
College masters, resident associates, and college coordinators help make the residential college system a hallmark of Rice. Rice spent nearly $1.1 million supporting these functions and the Rice Annual Fund provided approximately $117,000.

ACADEMIC INITIATIVES
The Program In Writing and Communication, The Center For Teaching Excellence, and The Gateway Program are examples of initiatives to enhance the Rice academic experience. The Rice Annual Fund provided approximately $284,000 of the $2.5 million that was spent in support of these programs.

CAMPUS SAFETY
The Rice Annual Fund provided $299,000 of the $2.7 million spent on campus security and emergency medical services programs that help Rice maintain a safe, secure, yet friendly campus environment.

V2C OUTREACH AND HOLISTIC EDUCATION
The Rice Annual Fund provided $130,000 of the $1.1 million spent on experiential learning opportunities through the Community Outreach Center, Leadership Rice, and The Center for Civic Research and Design.

STUDENT CENTER AND RECREATION PROGRAM
The Rice Annual Fund supported approximately $118,000 of the nearly $1,077,000 spent to operate the Student Center and the Student Activities Office, and to provide club sports and recreation programs through the Gibbs Recreation Center.

STUDENT SUCCESS
The Rice Annual Fund supported nearly $199,000 of the $1.8 million spent on student development and retention activities, the First Year Programs, academic advising, and The Center for Career Development.
The Parliament: a giving society for loyal owls

parliament (n.) — a gathering of owls

Rice University proudly introduces The Parliament, our new loyalty giving society dedicated to recognizing Owls who — by making a gift anywhere at Rice for three or more consecutive fiscal years — advance Rice’s students, campus and community.

How to be Recognized
Make a gift of any size, to any purpose, for at least three consecutive fiscal years (July 1–June 30). Maintain your recognition by giving every fiscal year.

Recognition
Individuals in The Parliament will be acknowledged annually and receive special recognition for milestone years of consecutive giving (3, 5, 10, 15, 20 and 25+ years).

Leadership Giving

Leadership gifts to the Annual Fund form the essential base of unrestricted support for the university. In FY15, 67 percent of the revenue raised by the Annual Fund was the result of leadership-level gifts. A $2,500 leadership gift provides as much value to Rice’s annual operating budget as does $50,000 in endowment assets.
Giving Societies

Recognition by a giving society is based on cash gifts to the Annual Fund in a given fiscal year (July 1–June 30). Corporations’ matching gifts are included in determining the total gift amount from a donor for giving society recognitions.

Campanile Society $50,000 or more
Sallyport Society $25,000–$49,999
Lovett Society** $10,000–$24,999
Brown Society $5,000–$9,999
Charter Society* $2,500–$4,999

*Charter Society levels for Young Alumni:
  $1,000 for classes 2005-2006
  $500 for classes 2007-2011
  $250 for classes 2012-2015

**Lovett Society levels for Young Alumni:
  $2,500 for classes 2005-2006
  $1,000 for classes 2007-2015

To reflect how important your leadership investment is to the Rice Annual Fund, we recognize leadership giving levels in the following ways:

- Recognition in the Annual Fund Donor Honor Roll
- Special communications throughout the year
- Access to a campus liaison to answer your giving questions and keep you informed about what’s new at Rice
- An invitation to a special event in honor of leadership donors
- Guaranteed, preferred seating at the President's Lecture Series
- Donors at the level of Brown Society and higher are invited to an additional event on campus in their honor.
- Donors at the level of Lovett Society and higher support the Rice Annual Fund Scholars program and have the opportunity at an exclusive event to get to know their scholarship recipients.
A Case for Participation

While the Annual Fund tracks rates of participation by parents, graduate-only alumni, and faculty and staff, an important goal of the Annual Fund is to increase undergraduate alumni participation, or the number of Rice undergraduates who give each year, because:

- There is strength in numbers. In FY15, gifts of $250 or less contributed more than $824,000 of support.
- A high rate of participation signals alumni’s satisfaction with the university and continued support of its mission.
- Publications like U.S. News & World Report consider undergraduate alumni’s participation when determining Rice’s national college ranking each year.
- The rankings influence how third parties view Rice and also affect the university’s ability to secure grants from corporations and other organizations.

Concrete examples of how gifts of every size benefit the university include:

**Student Life**
- $2,000 Funds a college theater production
- $100 Funds student housing for Alternative Spring Break
- $10 Funds a new volleyball for an intramural team

**Research & Academics**
- $1,000 Funds a visiting professor’s salary
- $500 Funds an undergraduates’ research symposium
- $200 Funds a 1-year subscription to The New York Times for Fondren Library

![Undergraduate Alumni Giving Participation Rates*](chart.png)

* As reported by U.S. News & World Report in 2015 based on a two-year rolling average
Alumni Volunteer Roles

Steering Committee
Members of this invitation-only group serve as a body of strategists, advocates, and promoters for alumni and parent giving at Rice. To achieve annual fundraising objectives for the Annual Fund, the committee provides direction for volunteer management, marketing, and communication.

Reunion Giving Committee
Every five years, alumni can participate as Reunion Giving Chairs or Reunion Giving Volunteers to encourage their peers to contribute to the university as part of their classes’ reunion gifts. The reunion campaign culminates with check presentations by reunion chairs to the university’s president during the Homecoming game.

Class Giving Committee
Nearly alumni serve as Class Giving Chairs and Class Giving Volunteers with the goal of strengthening their class’s close ties to the Rice Annual Fund between reunion years. Besides having a great time, Class Giving Chairs and Volunteers have the opportunity with this involvement to reconnect with their classmates and to learn first-hand about Rice’s new and exciting educational endeavors.

Corporate Agents
Rice is represented by alumni, spouses, parents, and friends at companies around the world that match their employees’ gifts to the university. Volunteers, identified as Corporate Agents, keep their colleagues informed about developments on campus and encourage them to participate in giving to Rice, particularly to the Annual Fund. These programs typically double their employees’ and retirees’ personal gifts.

Next Generation Task Force
Representing alumni in the years following their 10th reunion through their 20th reunion, the Next Generation Task Force engages a select group of alumni from various regions and professions in a compelling conversation about their roles – as individuals and as a generation – in the philanthropic legacy of Rice University, particularly through the Annual Fund.

Social Media Ambassadors
Bringing our alumni into the 21st century, Social Media Ambassadors promote Rice Annual Fund campaigns (i.e. College Battle, special challenges, End of Fiscal Year, etc.) on their Class’ Facebook
Additional Volunteer Roles

Student Philanthropy Committee
Student philanthropy programs at Rice are run by The Student Philanthropy Committee (SPC), a group of student volunteers who share the importance of philanthropy with their classmates and peers. Each year, SPC volunteers organize and promote events such as undergraduate class giving campaigns, thank-a-donor stations, and Jar Wars, while also connecting with alumni, parents, and friends who support the Rice Annual Fund and keep Rice such a remarkable place to learn and live.

Parent Leadership Council
With a gift of $2,500 or more, parents can join the Parent Leadership Council, which is composed of parents from around the world who are dedicated to participating in a leadership role with the Rice community. Volunteers contribute to and build relationships between Rice parents and the university, promote Rice to friends and fellow parents, and provide strategic direction for the Parent Giving program.

Voices for Rice Volunteers
Passionate Rice employees volunteer their time to advocate for Development and Alumni Relations with their peers. Volunteers represent schools and departments across campus, attend bi-annual meetings and share information with colleagues about supporting Rice.
Guidelines for Asking for a Gift and Tips for Success

Strategies may be based on affinity groups, giving frequency or level, geography, or other ideas.

Make your own gift before asking others to give.

- As a volunteer, you set the example for giving. Ideally, a volunteer will make his/her own commitment before asking for a gift. Our goal is 100% participation by volunteers in giving to the Annual Fund.

Prepare for your calls and emails.

- Set aside time to make your calls and emails.
- Outline your presentation and practice what you will say. Don’t be afraid to talk about why you give and why you are serving as a volunteer. Your personal experience may well be the most powerful argument for another’s engaging with Rice.
- Familiarize yourself with your project’s dollar and participation goals.

Get in touch and make the ask.

- Be friendly and positive. Personalize your call or email for each person.
- Be direct by asking your assigned peers to consider a specific gift amount or to consider being recognized at one of the Annual Fund’s giving society levels. Asking for a specific amount greatly increases the chances that your peer will give – or give more – than if he or she has to “guess” an appropriate amount.
- Use inclusive language in your ask (e.g., “I am asking you to join me in supporting Rice.”).
- Listen! Avoid talking too much. A long pause after you’ve asked for the gift doesn’t mean “no.” It means that he/she is thinking about your request.
- Remind your peer that corporate-matching gifts count toward the dollar total, as well as toward the donor’s recognition by the Annual Fund’s giving societies. (For more information, see Page 7.)
- Emphasize participation. EVERY gift, no matter the size, is important.
- Invite your peer to attend future events at Rice like Homecoming and Reunion weekend.
- Always be pleasant and say “thank you,” regardless of the outcome of the call.
Guidelines, continued

Follow up and thank your classmates.

- Persistence pays! Follow up with the peers you didn’t reach the first time. Try different ways to reach your peers – email, phone, Facebook – or even a personal letter!
- Remember that asking for a gift is a process. Do not be discouraged if you do not receive a positive response immediately. Keep the door open for further discussion.
- Thank the donor by personally acknowledging his/her gift with a written thank you note or email. Although the university sends official stewardship letters, a personal note from you will make a significant impression on your peer.

If you are not able to answer a particular question, tell your peer you will have someone at the university communicate directly with him/her. Then, please notify the Rice Annual Fund team at 713-348-4991 or giving@rice.edu.

When people are asked why they give, the most common response is, “Because someone I know asked me.” If you don’t ask, your peers may not give!
Addressing Hesitation and Indecision

Before you begin your outreach, take a moment to review the answers to these frequently asked questions or concerns. Keep in mind how you would like to be approached for a gift. No one likes to be pressured; our goal is to make people feel good about giving.

“I am in grad school/between jobs/have kids in college/just bought a house, so I am not in a position to give to Rice.”

“I understand that graduate school/college tuition is a significant financial commitment. Your gift of any amount to the Rice Annual Fund will help us meet our participation goal. Would you consider a gift of $___ to the Annual Fund in order to increase our participation?”

“Rice’s endowment is so large. Why should I give?”

“Endowment earnings cover less than half of Rice’s annual operating budget. Rice can only spend a set percentage of endowment earnings to cover these costs, rather than “spending down” from the endowment. So, while the endowment is extremely important to Rice’s long-term health, philanthropy plays a major role in keeping Rice, Rice. The Rice Annual Fund’s current-use gifts are those that can be used right away, without the endowment’s restrictions.”

“I’m concerned about Rice’s athletic program.”

“Thank you for sharing your feelings with me. Rice has enjoyed some athletic success in the past decade, and it also has provided opportunities to qualified student athletes. Rice prides itself on having both excellent academics and excellent athletics, and this creates a well-rounded educational and collegiate environment.”

“My child was denied admission to Rice.”

“I am sorry to hear that. Acceptance to Rice becomes more competitive every year, and admission is a difficult process. I hope that your child did get into other comparable schools and that he/she is enjoying the experience at the university or college he/she chose.”

“(For whatever reason), I will never give to Rice.”

“I am very sorry to hear that. Would you mind explaining a little more? We appreciate feedback so that the university can try to prevent similar problems for current and future students.
Online Volunteer System (OVS)

Rice Annual Fund volunteers use OVS as their primary tool to contact their classmates and ask for Annual Fund gifts. The system’s functions include selecting classmates to contact, email/phone templates to ask classmates for gifts (or obtaining information in order to do so), and recording outreach, including gifts and pledges.

Login:
- Visit https://online.alumni.rice.edu/.
- Use your Alumni Directory username and password. If you have forgotten your password, click on “Lost User Name or Password.”
- Click “Online Volunteer System” on the upper left side of the screen to enter OVS.

Select your classmates:
- On the left sidebar, click the link “Select My Classmates.”
- Narrow your search by sorting the list of classmates by college, last name, or city by clicking on the column headers. Click on the “Request Pairing” box. Click UPDATE to select your pairings before you move to the next page.
- Select at least 10 classmates whom you wish to contact.

Ask your classmates to give:
- On the left sidebar, click the link “Prospect List.”
- Click on the name of the person you wish to contact.
- Select which Contact Method you want to use (email, phone, or written correspondence) and click SUBMIT. A template will appear.
- Personalize the template and reach out to your classmate using the contact information provided. Please note the “Suggested Gift Amount” and include it in your solicitation.

Add a pledge:
- On the left sidebar, click the link to “Prospect List” and click “Add a pledge.”
- Add the pledge amount under “Pledge Total.”
- Feel free to add a comment in order to provide Rice more information about the pledge or to keep notes about your contacts with the classmate.

For more information about how to use OVS, speak with your class manager or view the video training presentations located under the “Committee Resources” tab.
Types of Commitments to the Annual Fund

Outright Gifts
Outright gifts are one-time gifts made by any of the following vehicles:
- Cash
- Check
- Credit card
- Securities
- Donor-advised funds or foundations

Life-Income Gifts or Bequests
Some donors may wish to give to the Annual Fund with a planned gift, such as a life-income gift or a bequest. For more information about these types of gifts, please contact Pamela Gray, Director of Gift Planning, at 713-348-4630 or pgray@rice.edu.

Multi-Year Pledges
A multi-year commitment of $2,500 or more per year for up to 5 years can be made to the Annual Fund. These can be set up by mail (pledge form), through a volunteer, or with an Annual Fund staff member and may be fulfilled by the above methods. For reunion campaigns, the full amount of a multi-year pledge will be recognized for the class’s reunion gift. Multi-year commitments may also be made by young alumni (Classes of 2005-2015) at their leadership-giving levels.

One-Year Pledges
A one-year pledge is a written commitment to pay any fixed amount within the current fiscal year. These can be set up by mail (pledge form), through a volunteer, or with an Annual Fund staff member. They are to be fulfilled by the end of the fiscal year (June 30) through any of the giving options listed in the “Outright Gifts” section.

Recurring Gifts
Donors can make recurring gifts with their credit card. A gift of any amount can be scheduled monthly, quarterly, or annually for a duration of up to 5 years. A recurring gift is an easy and affordable way to divide a larger gift into manageable payments. Arrangements for a recurring gift may be made online, with the paper pledge form, or by calling a member of the Rice Annual Fund team. For reunion campaigns, the full amount of the recurring gift will be recognized for the class’ reunion gift.
Ways to Give

Checks
Checks made payable to “Rice University” should be mailed to:

Rice Annual Fund – MS 83
Rice University
P.O. Box 1892
Houston, TX 77251-1892

Credit Cards
Rice accepts the following major credit cards: VISA, MasterCard, American Express, and Discover. Three ways to make a gift by credit card include:

• Visit us online at giving.rice.edu and click on “Make a Gift.”
• Call the Rice Annual Fund at 713-348-4991.
• Complete a gift form and mail it to the address on the form.

Matching Gifts
Many companies offer gift-matching programs which can double or triple employees’ or retirees’ personal gifts to the Annual Fund. In order to learn whether a company sponsors a gift-matching program, please contact the company’s human resources department or visit giving.rice.edu/match.

Gifts of Securities (Stocks, Bonds, Mutual Funds)
There may be tax advantages for individuals who donate by using securities. It is important that the donor notify Rice prior to making a stock transfer in order for Rice to identify, allocate, and acknowledge the donor’s gift. For more information about gifts of securities, contact Sandy Wilkerson, Gift Operations Manager, at 713-348-4696 or swilkerson@rice.edu.

Donor-Advised Funds or Foundation Gifts
Donors may direct gifts to the Annual Fund through their donor-advised funds or through private foundations. For information about how to direct these funds, please contact Sandy Wilkerson, Gift Operations Manager, at 713-348-4696 or swilkerson@rice.edu.

Life-Income Gifts or Bequests
Life-income gifts and bequests are only a few examples of planned giving options available. For more information about planned giving, please contact Pamela Gray, Director of Gift Planning, at 713-348-4630 or pgray@rice.edu.
Rice Annual Fund Contact Information

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Corporate Agents
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Associate Director, Team Lead
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Continued on next page....
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Additional Information

Websites

Online Giving  
giving.rice.edu

Online Volunteer System (OVS)  
online.alumni.rice.edu

Homecoming & Reunion  
rice.edu/homecoming

Rice News  
news.rice.edu

Rice Annual Fund gifts support student research by providing lab equipment and travel to national and regional conferences.