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I. WELCOME!

Thank you for joining the Class Agent Program!

You have joined an exceptional group of volunteers that plays a crucial role in the success of the Harvard Law School Annual Fund. The work you have set out to do will have an immediate impact on HLS by increasing alumni involvement and sustaining support for the Law School. Thank you again for your efforts, and we hope you enjoy reconnecting with your classmates!

With Gratitude,



Katie Gerstner
Associate Director
HLS Annual Fund

II. CONTACT INFORMATION

Find a full list of the HLS Annual Fund staff here: hls.harvard.edu/afstaff

Alumni Center Phone: (617) 495-3051

Annual Fund Email: fund@law.harvard.edu

Annual Fund Address: Harvard Law School Annual Fund
1563 Massachusetts Avenue
Cambridge, MA 02138

You can use the contact information above to reach out to the HLS Annual Fund team with general questions or concerns.



III. VOLUNTEER CHECKLIST



As a Class Agent you are responsible for encouraging your selected classmates to make a meaningful gift to the Law School. Your contribution and personal outreach truly make a difference in class participation. To make this an enjoyable and successful fundraising effort, follow the checklist below:

☐ MAKE YOUR GIFT TO THE HLS ANNUAL FUND

Set an example for your classmates by making your gift first!

- ▶ Give online at hls.harvard.edu/give.
- ▶ For other ways to make your gift, turn to page 5.

☐ CONTACT YOUR CLASSMATES

- ▶ Choose 10-20 classmates from your class list to solicit for a gift.
- ▶ Use CrimsonLink to make selections, access contact information and suggested ask amounts, and to submit new pledges or notes. For more information about CrimsonLink, see the Quick Reference Guide on page 10.

☐ MARK YOUR CALENDARS

Remember the following key dates during your outreach:

- ▶ **December 31** – Many people make their charitable donations at the end of the calendar year, so December is a great time to reach out to your classmates.
- ▶ **June 30** – Harvard Law School's fiscal year ends on June 30, so outreach in anticipation of this deadline is important to the success of the Annual Fund effort.

☐ KEEP US POSTED

- ▶ Please email any updates, questions, or comments to classagents@law.harvard.edu as they arise.
- ▶ Use CrimsonLink to enter pledges, update classmate contact information and track your progress.

☐ THANK YOUR CLASSMATES

- ▶ We will periodically update you on the status of your selected classmates so you can thank those who have given and continue contacting those who have not.
- ▶ This is a meaningful aspect of being a Class Agent and makes a difference in ensuring your classmates have positive interactions with the Law School.

IV. IMPORTANCE OF THE ANNUAL FUND ★

The HLS Annual Fund is made up of unrestricted gifts received each fiscal year. These gifts are not tied to any specific purpose and are allocated where they are needed most. They give the Dean the ability to address the Law School's most immediate needs, and ensure your gift has a direct impact on the HLS community. Priorities of the HLS Annual Fund include:

FINANCIAL AID

Today, approximately 71% of J.D. students receive financial aid from the Law School, and 42% receive need-based grants. Financial aid also encompasses Summer Public Interest Fellowships (SPIF) and the Low-Income Protection Plan (LIPP).

HLS is one of only a handful of Law Schools that provide need-based financial aid awards to ensure that all students who are qualified to attend HLS are able to. Our financial aid awards are expected to surpass \$18 million this academic year and are an important factor in attracting the top students to HLS.

FACULTY

With 95 full-time professors and more than 200 visiting faculty and instructors on campus this year, HLS has a 7:1 student-faculty ratio.

CLINICAL EDUCATION

There are clinics in over 30 areas of the law and 11 student practice organizations available that provide pro bono legal services to those in need. HLS students have provided over 4.8 million hours of pro bono legal services since the inception of the program.

TEACHING & LEARNING

The Law School combines the breadth of a prolific research institution with the personal connection of the first-year section experience. Along with fundamental law school courses, HLS offers numerous small seminars and reading groups, and more than half of our courses today have fewer than 25 students.

Your annual support is a vote of confidence in the leadership and activities of the Law School. Alumni participation in the Annual Fund unites HLS graduates together for a common purpose: to sustain Harvard Law School's tradition of excellence.

As a volunteer, it is essential that you share the importance of the Annual Fund with your classmates!



V. WAYS TO MAKE YOUR GIFT

ONLINE

Gifts by credit card can be made online via our secure giving form at hls.harvard.edu/give.

MAIL

Gifts by check can be sent to our mailing address below. Checks should be made payable to the *Harvard Law School Annual Fund*.

Harvard Law School Annual Fund
1563 Massachusetts Avenue
Cambridge, MA 02138

PLEDGES

Pledges can be made by contacting the Annual Fund staff at classagents@law.harvard.edu, or sending a gift form indicating a pledge to the address listed above.

MATCHING GIFTS

You may qualify to have your company or firm match your gift to the Law School. To find out if your or your spouse's company has a matching gift program, visit alumni.harvard.edu/giving and click the Matching Gifts section. If your organization offers a match, please request a matching gift form from the company and send us the completed form with or following your gift.

◀ ***This is a great way to increase your impact!***

PLANNED GIVING

For information on making a planned gift, please contact Harvard Law School's Planned Giving staff at (617) 496-9265 or plannedgiving@law.harvard.edu.

OTHER WAYS OF GIVING

For information regarding bank wires, securities, and other property, please visit our website at hls.harvard.edu/alumni and click *How to Make Your Gift*.

VI. CLASSMATE OUTREACH GUIDE

There are many ways you can reach out to your classmates about their annual gift, from meeting in person to sending a text message. Feel free to use the method you are most comfortable with, and follow the included templates to guide your solicitation.

PHONE & IN PERSON

1. Introduction

- Reintroduce yourself and catch up with your classmate, directing the conversation toward the Law School.
- Explain that you have volunteered to serve as a Class Agent and answer any questions they may have about the role.

2. Purpose

- Indicate that you are reaching out to ask them to make an annual gift to the Law School.
- Highlight that a goal of the Class Agent Program effort is participation.
- Explain how they can make their annual contribution and share the link to give online.

3. Response

- If yes, thank them for their support and either enter a pledge using CrimsonLink, or send a note or email to the Class Agent Program staff.
- If unsure, use some of the “Key Points” in section VII to encourage them to give.
- If no, thank them for their time and offer to answer any other questions about HLS. Additionally, you can direct them to contact a member of the Annual Fund staff.

4. Close

- No matter their response, thank your classmate for their time and consideration.

5. Report

- If you are using CrimsonLink, log on to enter pledges, update classmate contact information and track your progress.
- You may also contact the Class Agent Program staff with updates about your progress, or to send them any questions you may need help answering.

EMAIL & LETTER

Dear [Salutation],

I am writing to ask you to join me in making a gift to the Harvard Law School Annual Fund this year.

From our time as students to today’s 1L class, the Annual Fund plays a vital role in continuing the Law School’s tradition of innovation and excellence. It also allows HLS to maintain current financial aid levels, fund public service fellowships, and help subsidize faculty research and student programs.

I have set a goal of 100% participation from the **XX** classmates that I am reaching out to personally this year. I hope you will support HLS with a gift of **\$XXX**. Every gift counts toward and makes a direct impact on the next generation of students to follow in our class’s footsteps.

You can make your gift online at hls.harvard.edu/give, or let me know if you would like to pledge and I can forward it to the Annual Fund team at HLS. Thank you in advance for your support.

Sincerely,

Name



TEXT & SOCIAL MEDIA

Hi [NAME], can you believe it's been **X** years since we graduated from HLS? I am working with the HLS Annual Fund as a Class Agent to invite people to give back to the Law School. We're focusing on our class's participation, not on dollars, and I hope you will join me in supporting HLS with a gift this year. You can make your gift online at **hls.harvard.edu/give**.



VII. KEY POINTS FOR SUCCESS

Please read these points before you reach out in order to make a strong case for HLS. You can use these facts to further personalize your outreach or help answer questions your classmates may have.

The most successful classmate outreach often includes your personal reasons for making a gift to HLS!

WHY GIVE TO HARVARD LAW SCHOOL?

- Harvard Law School has been able to set the standard for legal education and research due to the generosity of donors.
- Support is necessary to recruit top faculty, maintain cutting-edge research programs, and attract the best and brightest student body regardless of economic background.
- The Law School works to ensure access to our programs and the careers students seek, regardless of their financial positions. While at HLS, students learn rigorous problem-solving skills to use in any arena, anywhere in the world.
- Harvard Law School graduates are not only prominent attorneys, but also judges, academics, novelists, business leaders, consultants, policy analysts, journalists, politicians, international aid workers, and more.
- Provide your own reasons for giving to HLS. Did you have a favorite professor or class that made an impact? How did HLS influence your life? A personal touch may inspire your classmates.

WHY GIVE TO THE ANNUAL FUND?

- Gifts to the Annual Fund are allocated where they are most urgently needed, such as student aid or clinical programs. They are not tied to any specific purpose and therefore can be allocated to our area of greatest need.
- Priorities of the Annual Fund include financial aid, clinical education, and public service.
- Gifts to the Annual Fund have an immediate impact on the HLS community and directly affect students, faculty, and many programs across the Law School.

OTHER HELPFUL INFO:

- Gift amount does not factor into the Annual Fund's participation rate; gifts of \$25, \$250, or \$25,000 will have the same weight toward participation.



VIII. QUICK REFERENCE GUIDE

CRIMSONLINK

CrimsonLink is an online tool for Harvard University volunteers. The interface allows you to select and track your peer solicitation assignments, obtain up-to-date giving history and contact information for your prospects, and access helpful information from our online resources.

To log on to CrimsonLink, please visit alumni.harvard.edu/volunteer/crimsonlink and click “Alumni Login.”

Please Note: If this is your first time using your HarvardKey, you will need to register for an account or “Claim your HarvardKey.”

To claim your HarvardKey, you'll need the following:

- Your eight-digit Harvard University ID (HUID)
- Your last name
- Your date of birth
- A personal email address to use for account reminders

If you have any problems with this process, feel free to email ithelp@harvard.edu or call (617) 495-7777 for assistance.

GIFT COUNTING RULES

Harvard Law School's fiscal year runs from July 1 through June 30 every year.

- Any **gift** made to the Law School between July 1 and June 30 will count as a gift for the current fiscal year.
- All gifts, **including matching gifts**, received between July 1 and June 30 will count toward this year's Class Agent Program.
- **Pledges do not count** toward the program's total; please follow up with classmates who have outstanding pledges and urge them to fulfill their commitments prior to June 30. This will assist us in reaching our goal.

GIVING SOCIETIES

These societies are used to thank and recognize our most generous and loyal donors. Encouraging classmates to join either society can be a useful tool when asking them to make a gift.

1817 Society

The 1817 Society recognizes HLS's most loyal donors—those who have given at least five years consecutively. Members receive special recognition in our annual Report of Gifts.

Langdell Society

The Langdell Society recognizes those who have given \$10,000 or more to the Annual Fund in the current fiscal year. Courtesies extended to Langdell Society members include an exclusive dinner party in New York and special recognition in our annual Report of Gifts.

Oliver Wendell Holmes Society

The Oliver Wendell Holmes Society recognizes those alumni and friends who have included the Law School in their estate plans and those who have established a planned gift to benefit the School. The foresight of these generous alumni and friends allows the School to focus on the challenges ahead, secure in the knowledge of available resources in the future. Members receive special recognition in our annual Report of Gifts.



HLS AMICUS: OUR NEW ONLINE NETWORKING PLATFORM

Amicus is an online system for alumni networking and student mentoring that enables you to reconnect with friends and classmates, forge new relationships across shared interests, and deepen your HLS community.

We hope that you will sign up to become a mentor or advisor and that you encourage your classmates to do the same. Please visit amicus.law.harvard.edu or email amicus@law.harvard.edu to learn more.



VOLUNTEER CODE OF CONDUCT

All Harvard Law School Annual Fund volunteers agree to the following while acting as a volunteer, performing official duties as an alumnus/a of HLS, and attending alumni-related events in Cambridge and around the world.

- Volunteers shall fulfill their duties with the highest level of professionalism, responsibility, and integrity.
- Volunteers shall treat other alumni and the larger Harvard Law and Harvard University community of faculty, staff, and students with respect at all times.
- Volunteers agree to handle sensitive information with care and only use it for its intended purpose, as set forth in the Harvard Law School Alumni Center Confidentiality/Non-Disclosure Statement.

If you have any questions about the Code of Conduct, please contact the Annual Fund staff.

IX. GLOSSARY

Over the course of your time as a Class Agent, you may hear some of the following terminology:

Ask Amount

The amount you should ask each classmate to give to the Annual Fund. Ask amounts have been researched and chosen by a member of the Annual Fund staff for each of your assigned classmates.

Assigned/cleared for solicitation

Assignment has been made, but contact has not yet been initiated.

Class Agent Program

A group of Harvard Law School alumni volunteers that reach out to their classmates to encourage positive connections with HLS and support of the Annual Fund.

Completed

Volunteer outreach efforts completed.

CrimsonLink

Online volunteer tool available for use by Class Agents to help expedite the classmate selection, outreach and reporting process.

Declined

Classmate declined to give at this time.

Fiscal Year

The period between July 1 and June 30 during which the Annual Fund staff and volunteers solicit and record gifts and pledges.

HLSAC

Harvard Law School Alumni Center – located in Pound Hall on the Law School campus.

Lapsed

More than five years have passed since the donor's last gift.

LYBUNT

Donor gave Last Year But Unfortunately Not This year.

Non-donor

The classmate has never contributed to Harvard Law School.

Pledge

A commitment to make a future or multi-year contribution to Harvard Law School.

Pledge Period

The period in which classmates can make an outright gift or pledge and have it count towards the class gift effort.

Pledge Payment Period

The amount of time donors have to pay off any outstanding pledges.

SYBUNT

Donor gave Some Year (in the past five years) But Unfortunately Not This year.

Unrestricted Gift

A gift that has not been designated for a specific allocation or use. Unrestricted gifts to the Annual Fund are put to work right away wherever they are needed most.