Annual Giving Programs Call Center Policies and Procedures Manual

SAINT LOUIS UNIVERSITY

September 2007
You must be on time for training. We will not be letting anyone in after we begin. If you are late, you will not be able to participate in the training, therefore making you ineligible for employment at Annual Giving Programs. So, please be on time. We also ask that you please do not chew gum or use/bring your cell phone during the training.

We will provide breakfast (bagels, pastries and fruit) 30 minutes prior to the training session Saturday and Sunday (8:30-9am) and a snack later during the session.

You will be paid for 2 hours to study your training materials. Please read through the information at least 5 times. If you do not study the packet, it will be quite evident as we will be moving at a rapid pace. We have the right to send any unprepared caller trainee home. If this occurs, you will not be paid the 2 hours and will no longer be employed at AGP. To be paid for the 2 hours to study your training materials, you must attend the Phonathon training in full. The two hours will be added to your timesheet by your supervisor after you complete two weeks of work.

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**STUDENT PHONER AGREEMENT**
DEVELOPMENT AND UNIVERSITY RELATIONS
Development and University Relations is the fundraising and marketing division of the University. The division is comprised of the following:

- **Alumni Relations**: responsibilities include hundreds of events, both local and national, including Homecoming and the Easter Egg Hunt. Their goal is to instill pride and loyalty to the University.

- **MARCOM**: Marketing and Communications is responsible for all internal and external communications for the University including: Publications and Graphic Design, Marketing and Web Services, Media Relations, Sports Information and SLUCare Marketing.

- **Development**: responsibilities include the research, cultivation, solicitation and stewardship of potential donors to the University.

ANNUAL GIVING PROGRAMS
Annual Giving Programs (AGP) oversees several fundraising programs, using both phonathons and direct mail, which encourage our alumni, friends and parents to financially support the University. These programs include Annual Giving, the Parents Program and the Student Class Giving Program. Last year, AGP raised $2.15 million in pledges and gifts through Annual Fund phoning and a total of $3.6 million from all AGP sources (direct mail, emails, etc.). Most times, YOU are the only personal contact our alumni get from the University.

MAJOR GIFTS
These are solicited by school specific Development Officers and are typically gifts over $5,000. These donors all participated in the Annual Fund at some time in the past (John Cook, Edward and Margaret Doisy, Richard Chaiftez, etc.). Therefore, AGP plays a large role in turning our annual donors into major donors.

Contrary to what you may think, giving capacity is not the only tell tale sign of a major donor—zip codes, consecutive years of giving and affinity for SLU also help build the major donor relationship.

PLANNED GIVING
A planned gift occurs when an individual incorporates SLU into their overall estate plan or will. Planned gifts provide numerous advantages including significant income tax savings, estate tax savings and payments for life or for a period of years. Such gifts include bequest provisions in a will or trust, life income arrangements, lead trusts, life estates, gifts of life insurance and beneficiary designations made with retirement assets or insurance policies.

CORPORATE AND FOUNDATION RELATIONS
In addition to gifts from alumni and friends, the University solicits corporations and foundations for support at high levels. Often corporations and foundations base their decision to support the University on the number of alumni who give (not just the amount they give). For this reason, it is extremely important that AGP retains existing donors, while recruiting new donors. With a high percentage of alumni support, corporations and foundations are more likely to give. Every gift helps Saint Louis University.
The Campaign for Saint Louis University: Where Knowledge Touches Lives

What is it?

The Campaign for Saint Louis University: Where Knowledge Touches Lives, kicked off in June 2002. It is the University’s most ambitious fundraising effort to date with a goal of $300 million, which includes a $25 million Annual Fund component. As of June 30, 2007 the Campaign total stands at more than $352 million.

Campaign Goals

- For Students: $100 million
- For Faculty: $75 million
- For Science and Technology: $50 million
- For Centers of Excellence: $30 million
- For Campus Life Enrichment: $20 million
- For Annual Support: $25 million

Campaign Total $300 million
THE SAINT LOUIS UNIVERSITY FUND FOR EXCELLENCE
MAKING A WORLD OF DIFFERENCE

ANNUAL GIVING PROGRAMS MISSION STATEMENT
The Office of Annual Giving Programs at Saint Louis University generates annual financial support from alumni, friends, parents, students, faculty and staff in meeting the University’s Jesuit mission of teaching, research and service for others. Annual gifts support the entire SLU experience and target the most pressing needs in education — scholarships, teaching, research, health care and student life.

WHY GIVE TO SAINT LOUIS UNIVERSITY?
Thanks to the generosity of donors, during the last 20 years Saint Louis University has committed vast resources to student scholarships, faculty initiatives and campus improvements. These investments in our students and in our community have propelled us ever closer to our goal of becoming the finest Catholic university in the nation. Clearly, we have the momentum to reach that goal. From medical discoveries that help save lives, to classroom discussions that inspire young scholars, to more than 750,000 hours dedicated to service, Saint Louis University makes a difference in our community and around the world. With your continued support, Saint Louis University fosters the intellectual and character development of almost 12,000 students on campuses in St. Louis and Madrid, Spain. Through teaching, research, health care and service, Saint Louis University is truly the place where knowledge touches lives.

TEACHING
At SLU, we embrace innovative technology and teaching techniques; we cultivate a community of learners. Our Reinert Center for Teaching Excellence promotes outstanding teaching by offering faculty and graduate assistants consultations, mentoring, seminars and technology workshops that enhance their classroom presentation skills. First-year students can enroll in SLU’s unique "Inquiry Courses," small classes that encourage collaboration and critical thinking. Topics for these classes, which are taught by senior faculty, include "Mathematics and the Art of M.C. Escher," "Statistics: Sports and Politics" and "Page to Stage." Through interaction with our world-class professors, SLU students become the innovators, leaders and global problem-solvers of the future.

RESEARCH
Ground-breaking research continues to occur at Saint Louis University everyday. Consider the strong foundation of research at Saint Louis University:

- 1836: The first medical department established.
- 1839: The first medical degree west of the Mississippi awarded.
- 1928: The School of Nursing founded.
- 1943: Edward Doisy’s work with vitamin K wins the Nobel Prize.
- 1964: The Institute for Molecular Virology founded.
- 1991: The School of Public Health founded; it is the only such school at a Catholic university.
- 2001: Saint Louis University has emerged as a major player in the nation’s strategic plan to battle bioterrorism. SLU is one of only four institutions that comprise an important new initiative to protect the United States against such threats — the Midwest Regional Center for Excellence in Biodefense and Emerging Infectious Diseases Research.
- Tomorrow: The Edward A. Doisy Research Center represents a natural next step in the evolution of the University’s long-standing research tradition, all with the goal of making our world a healthier place.
Saint Louis University’s new Research Center will focus research in several core areas: cancer; cardiovascular and pulmonary diseases; neurosciences and aging; liver disease; and infectious disease and biodefense. Discoveries by Saint Louis University researchers today are changing the world of tomorrow.

**Health Care**

In concert with its Jesuit mission and philosophy, the Saint Louis University Medical Center aims to serve and address the health and medical concerns of society. The Medical Center supports the training of physicians, nurses and other health care providers, as well as the provision of care in underserved urban areas and developing countries. More than 95 percent of SLU's medical school students volunteer their Saturday mornings giving free medical care at the student-run Health Resource Center. The University’s medical initiatives serve as further evidence of a commitment to others.

**Service**

Saint Louis University is proud of its heritage as America's second oldest Catholic, Jesuit institution of higher education. Since its beginnings, SLU has nurtured the spiritual and moral development of all members of its community. We are both proud and honored that SLU students, faculty, staff and alumni perform hundreds of thousands of hours of service for the community each year. More than 2,000 students, faculty and staff participate in the annual Make a Difference Day program each fall to provide service to a wide variety of local organizations. SLU students spend their spring break serving the poor and marginalized across the United States, Mexico, Puerto Rico and El Salvador. The Irvin and Maggie Dagen Public Interest Fellowship stipends are awarded to law students who obtain volunteer positions with public interest organizations for the summer, serving the underrepresented and/or ensuring justice in our society. No matter what the area of study, Saint Louis University strives to instill in our students a sense of leadership and ethics through community outreach and social responsibility.

**Why give now?**

Saint Louis University is a University on the move, gaining national and international recognition for teaching, research, health care and service. The influence of Saint Louis University reaches beyond our campus and into the global community.

Annual gifts help keep tuition affordable and bring leading scholars to our classrooms and scientists who perform landmark research to our laboratories. When large numbers of alumni and friends support the Saint Louis University Fund for Excellence generously and regularly, corporations and foundations are motivated by example to support the University as well.

Saint Louis University seeks to further enrich the quality of campus life and community by renovating major student housing and recreational facilities and by continuing to improve the campus. Now is the time for alumni, friends, faculty, staff and parents to invest in the future through the Saint Louis University Fund for Excellence.

**Areas of Excellence**

- Excellence in Teaching
- Excellence in Research
- Excellence in Health Care
- Excellence in Service to Others
- Excellence in Academic Schools and Colleges
- Excellence in Student Leadership
- Excellence in Community Revitalization
What are we doing?

We are actively trying to accomplish three things with each call:
1. Update records
2. "Friend" raise
3. Fund raise

Before making the ask, you should have answered these questions:
1. What do you and the prospect have in common?
2. What is the prospect’s passion?
3. How does the prospect feel about SLU?

Who Are We Calling?

Our prospects are chosen from over 105,000 Saint Louis University alumni. Of those alumni, over 40% live in the St. Louis metropolitan area. We will be contacting over 50,000 alumni this year. The prospect pool includes both those who have given to the University previously and those who have never given. We will attempt to phone as many of the prospects as possible in addition to direct mail pieces.

Why do people give?

There are many reasons why someone might choose to give to the University—a great college experience, a favorite faculty member, our Jesuit mission, they feel they owe it to SLU for the education they received, etc. Most importantly, they give because we ask them.
ROLE OF THE STUDENT PHONER

As student phoners, you have a dual purpose in the Annual Giving process. The primary objective is to bring the prospect to a decision - hopefully that of making a commitment to the Annual Fund. At the same time, you serve as an ambassador for Saint Louis University. The purpose of this role is to make certain that, at the end of the call, the prospect feels good about Saint Louis University.

You were chosen to be a phoner because of your ability to effectively communicate the positive experiences you have had so far at Saint Louis University. This is one quality that will make you a successful phoner. Our alumni want and deserve to hear that their alma mater continues to provide a positive experience to those who follow in their footsteps. Your personal experiences and positive attitude are what you bring to AGP.

Occasionally, you may hear negative comments about the University or other issues. Do not engage in a debate or argument over an issue. Remember that you represent Saint Louis University on the phone and must remain positive to diffuse any negative situations.

Useful responses can be -

“I understand your concern”
“I’ll make a note of your comment and pass it on to the administration”

The most important goal is to bring the conversation back to the main focus - their support of the Saint Louis University Fund For Excellence.

PROFESSIONAL STAFF

Director of Annual Giving Programs

Assistant Director of Annual Giving: Parent & Student Programs

Assistant Director of Annual Giving: Phonathon Programs

We have a standard set of goals for all of our programs that we strive to attain within our fiscal year (July 1-June 30). These goals include:

- To raise money through our phone and direct mail efforts.
- To increase the percentage of participation from our alumni and friends.
- To renew and upgrade previous donors.
- Acquire new donors.
In keeping with the Jesuit mission of Saint Louis University, our purpose is to assist in educating the whole person in order that they will become women and men for others. Therefore:

- We strive to provide the best working environment possible. In the competitive, and sometimes stressful, field of fundraising, the job you do is not always easy. Creative encouragement and motivation are key to promoting job performance and success.
- We strive to teach our student workers how to be good employees by example, by setting and achieving goals and by adhering to established policies and procedures.
- We strive to show the importance of being an alumnus of Saint Louis University. We want you to understand the importance of supporting your alma mater in the future, so that you may carry on the traditions and the mission of Saint Louis University.
- Without the alumni, the academic programs, the financial aid assistance, the campus itself, and the overall reputation of Saint Louis University in place today, would not have been made possible.

CALL CENTER MANAGERS

The Call Center Managers were chosen simply because they were excellent phoners. Their primary function is to help you to become a better phoner. They are here to:

1. Assist the professional staff in the ongoing training and motivation of the student phoners. They will listen to your calls and help you to become a better phoner. They will answer questions, manage breaks, set up the room each night for phoning and run phoning reports. They are invaluable members of the AGP team.
2. Alert the professional staff of troubled phoners, as well as discipline problems.
3. Monitor Phoning: the supervisors regularly monitor all phoners. This is done to help you develop skills that are more effective so that you may become the best possible phoner. Regular monitoring also ensures that each call is handled in a professional manner.

TEAM LEADERS

Team Leaders were chosen because of their leadership abilities and skill set. Team leaders have shown dedication to AGP, above average statistics and leadership abilities. AGP Team Leaders are responsible for assisting staff during training weekends and on going one-on-one training throughout the year. Team Leaders are expected to mentor new callers and lead by example. Team Leaders will also alert staff of any caller discipline problems.

DAY STAFF

The day staff includes a Call Center Manager and student workers. The day staff duties include processing and mailing the pledges and unspecifed from the previous evening, general clerical and office duties as well as assisting with reminder mailings and other miscellaneous projects.
STUDENT PHONERS

As student phoners, your primary objective is to bring the alum to a decision – hopefully, that of pledging to the University. Your job as a student phoner, therefore, is to assist in meeting the following goals:

- To raise money through our phone and direct mail efforts.
- To increase the percentage of participation from our alumni and friends.
- To renew and upgrade previous donors.
- Acquire new donors.

At the same time, you serve as an ambassador from Saint Louis University to the alumni. It is important that the alum feels good about Saint Louis University at the end of the call. As a student phoner, you will personally contact our alumni to update them on things happening at SLU, as well as providing them the opportunity to contribute to the Annual Fund.

What Do the Most Successful Fundraising Programs Have in Common?

- Callers Who Negotiate with Personalization AND Persistence
- Solid Reasons Why to Give
- Structured Goals and Objectives
- Creativity
- Student Callers Who Care
UNIVERSITY POLICY

According to the Saint Louis University Policies and Procedures Manual (Employee Relations Chapter, No.3.6.10, page 1 of 9) the staff corrective counseling section states the following:

“Saint Louis University hopes all employees will interact with their co-workers in the spirit of consideration, respect, and cooperation. We operate from an assumption that our employees are the primary assets of the University with significant contributions to make to the organization. We believe that our employees will rarely lapse from excellent work or adherence to established rules and regulations. We also believe that our employees will quickly correct any lapses in their work or violations of policies. Except or instances of serious misconduct warranting immediate dismissal, this policy will provide for the fair and consistent application of corrective counseling on a progressive basis. The extent of the counseling will be based on the gravity of the offense, the employee’s length of service, and the employee’s work record.

However, according to the Saint Louis University Policies and Procedures Manual (Employee Relations Chapter, No.3.6.10, page 6 of 9) the staff corrective counseling section states the following about discharging an employee:

“We reserve the right to terminate an employee at any time.”

In the event of a violation of a policy or procedure contained herein, the employee is subject to verbal warnings or a corrective action, which is a written summary of the violation that is signed by the Director. Corrective actions will be kept on file in the Office of Annual Giving Programs. Two instances of corrective action result in termination. Violations of any policy contained herein will be dealt with on a case-by-case basis. However, as stated above we reserve the right to terminate employment at any time.
DISCIPLINARY POLICIES

It is our hope that disciplinary actions will never have to be implemented. There are three major areas where disciplinary action may need to be taken, which include, attendance, job performance and professionalism. A violation of any of these policies may result in termination.

STUDENT WORKER POLICIES

According to the Saint Louis University Policies and Procedures Manual (Human Resources System Chapter, No. 3.3.10, page 1 of 4) the student worker policy states the following:

“...since student workers are heavily relied upon by their employers to fulfill certain responsibilities, it is expected that they report to work when scheduled, and that they fulfill their work responsibilities in a professional manner.”

Any breach of the following can/will be considered “serious misconduct warranting immediate dismissal.”

1. JOB REQUIREMENTS

- Phoning takes place Sunday-Thursday from 6:00 to 9:30 and Sunday afternoon from 12:30-4. You need to be in your seat and ready to start by 6:00 and 12:30, respectively. Tardiness will not be tolerated.
- You will make your own schedule. Your schedule does not need to remain the same each week. The sign-up sheet is located in the phoning room.
- The back door of DuBourg Hall (by the library) is locked at 6 p.m. Therefore, you need to go to the front (Public Safety) entrance and sign in after 6 p.m.
- You are required to work two nights per week--any exceptions must be submitted in writing no later than Wednesday of that week. Either a hand written and dated note or an email is sufficient.
- No shifts are required during mid-term and finals week each semester, but we will phone if at least 6 phoners are signed up to work.
- In the event of a short work week (Easter, Labor Day, Fall Break and Thanksgiving) the professional staff may lower the requirement to one shift by making a note on the schedule. If the schedule does not indicate a change of requirements then assume you have to work two shifts.
- If you sign up but find that you cannot work, a phone call or email is mandatory. Please call the office at either 7-3781, 7-3782, 7-3783 or 7-2206 or email Schwarkj@slu.edu 24 hours in advance, except in the case of illness or emergencies.
- If you have to cancel a phoning shift, you are responsible for making up the shift within that week to complete the required 2 shifts. For extended absences of more than one week due to illness, your scheduling needs must be communicated with a member of the professional staff.
- If you are scheduled on a Sunday and cannot work, you must cancel your shift (by phone, email or in person) by 5 p.m. on Friday, unless it is an absolute emergency. A call or reason the next day or just simply “forgetting” is not acceptable.
- If you are not signed up to work during a given week without providing written notice, we will assume job abandonment. Thus, your position will be terminated.
- There will be a six-week probationary period during which your effectiveness will be assessed. There will be performance review meetings with the Assistant Director.
- While you can work both shifts on Sunday this will not fulfill your requirement of two shifts per week. To keep you up to date on current events at SLU we require that you
work two different nights each week. If your schedule only permits you to work on Sundays, talk to Katie Schwartz to see if special arrangements can be made.

2. **ON CALL (OC)**
   - We need to keep 26 stations full every night. If you come to sign up and all spots are filled, write your name in an ON CALL (OC) space at the bottom of the schedule and plan on coming in to work that shift. If a spot opens up, you will be here to fill it.

3. **BEHAVIOR**
   - Inappropriate or disruptive behavior of any sort will not be tolerated and may result in immediate discharge.

4. **CELL PHONES**
   - Cell phones must be turned off and put away during all calling shifts.

5. **HONESTY/CONFIDENTIALITY**
   - You have a great responsibility in your position. Any breach of trust may result in immediate discharge.
   - You have access to an abundance of donor information, including names, addresses and giving history, therefore, **ALL donor information is to be kept completely confidential.**

6. **ATTENTIVENESS**
   - All student phoners shall give their complete and undivided attention to the speaker during all start-up and post-break speeches. Disrespect towards staff may result in immediate discharge. Falling asleep will not be tolerated—if you are that tired, clock out and go home.

7. **TIMEKEEPING**
   You are required to sign in when you arrive and sign out when you leave.

   According to the Saint Louis University Policies and Procedures Manual (Employee Relations Chapter, No.3.2.6, page 1 of 2) the time records section states the following:

   “Any intentional or willful falsification of time records is a serious violation of University policy, and will result in disciplinary action, including the possibility of immediate discharge.”

   - Entering and submitting your hours into Self-Service Banner (SSB) are your responsibility. The link to SSB is bookmarked in Internet Explorer at each of the calling stations. Enter your time in SSB at the end of each shift. Start your timesheet at the beginning of the pay period and submit it once you have worked your required shifts for that two-week pay period. Timesheets must be submitted by 10 a.m. on the Monday following the end of the pay period. If you have a problem either logging onto Banner (IT department 7-4000) or with your timesheet (payroll department 7-2384, 7-2383 or 7-2470), contact them directly. Not submitting your time will result first in a verbal warning. Multiple timesheet problems will result in written warnings and, possibly, termination. **If you fail to enter/submit your time after a verbal warning, we will not enter/submit it for you.**
8. **EATING/DRINKING**
   - Eating is not permitted while on the phones. Candy is available to everyone, but it may only be consumed before your shift or during break. Soda is available, but may not be consumed on the carpet. Only water (in bottles with caps) is allowed while phoning and must be stored on the floor.

9. **READING**
   - Reading non-work-related materials while you are working is not permitted.

10. **E-MAIL**
    - E-mail is not permitted while using the CampusCALL system. You may use a computer for e-mail BEFORE you sign in, AFTER you sign out or DURING breaks.

11. **COPY MACHINE USE**
    - The copy machine is not available for personal use or without prior approval.

12. **PAYCHECKS**
    - Sign up for Direct Deposit to your checking or savings account. Otherwise, a paycheck will be mailed to your home address.

13. **DAMAGE/DOWNLOADING/WEB SURFING**
    - Do not damage the computers or any other equipment. Do not write on anything, including the wrist rests and the Policies and Procedures manuals (unless instructed to do so). Do not make changes to word documents. Do not download anything to any computer unless instructed to do so. This includes software, music, movies, instant messaging, etc. Be sensible and surf only appropriate websites before, during or after your shift. *Unauthorized downloading or surfing objectionable websites at any time will result in immediate termination.*

14. **PROPER ATTIRE**
    - Use common sense and dress appropriately for work. Keep in mind that we may have visitors from time to time including Development Officers, Associate Vice Presidents, Vice Presidents, the Provost or even Fr. Biondi. Wearing pajamas is not acceptable.

15. **HOMEWORK**
    - Homework is not allowed to be done or even in sight while on the phones. You may bring it along to be done BEFORE starting your shift, AFTER completing your shift, or DURING your break.

16. **INTERNET/COMPUTERS**
    - When the shift begins, all windows (Word, IE, etc.) must be closed and you must give your full attention to all startup activities. Do not use the computer, mouse, etc.
    - Do not have any other windows open, unless instructed to do so, while in CampusCALL. This includes Word and Internet Explorer (Facebook, e-mail, etc.). The internet is only to be used in order to find information for a prospect. If you are found to have another window open while in CampusCALL, you will be sent home without pay and issued a warning. Subsequent violations will result in termination.
    - You may surf the web (using your discretion) BEFORE starting your shift, AFTER completing your shift or DURING your break.
Saint Louis University
Mottos to call by:

- Annual Giving has nothing to do with affordability, but everything to do with affinity.
- Everyone CAN give, but not everyone WILL give.
- People give to people.
- You get what you ask for!
- Ask at every level.
- Rapport opens the door for you to find out more about the alumna/alumnus, and provides you with information to make a tailored case for support. Look for clues during rapport that will make asking and negotiating easier later in the call.
- Reasons + Options = Pledges (No one will give without strong reasons to give)
- SMILE while you talk with alumni — they know it!
- 8-10 minute phone calls get the best results!
- No one will give without being presented with strong reasons.
- Persistence, Persistence, Persistence!
Donors vs. Nondonors

Donors
- Regular Contact with School
- Loyal
- Good Demographic Information

Nondonors
- Infrequent Contact with School
- Loyalty in Question
- Demographic Information Issues

Differences in Donors

Lybunts
- Current Donor
- Loyal Support
- Goal is to Upgrade Gift and Secure Pledges on Credit Card

Sybunts
- Lapsed Donor
- Reason why they have stopped giving
- Goal is to return them to Current Donor Status, Secure Pledge on Credit Card, Upgrade if Possible

Why Are They Nondonors?
- Alma mater hasn’t been priority?
- Financial obligations?
- Bad experience with alma mater?
- -OR-
- Has never been asked properly?
- Doesn’t understand what annual fund is?
- Lost touch with school over time?
  Anticipate reasons to be prepared, but don’t make blanket assumptions!
Persistence Tip Sheet

1. **Definition of Persistence**: The ability to keep the conversation moving successfully when the prospect has begun to indicate disinterest. The goal is to complete the call without angering the prospect.

2. **Persistence vs. Being a Pest**: Being pushy is not listening to what the person is saying and trying to “force the conversation”. Persistence is responding to what the prospect is saying by addressing concerns the prospect brings up and then moving the conversation forward in a positive direction.

3. **Options in Persistence**: Giving the prospect options during the conversation (whether you are talking about optional gift levels, optional topics to cover during rapport, or optional reasons to give), you are helping them feel in control of the conversation. In reality, since you are the one providing the options, it is always a winning conversation for you.

4. **Humor in Persistence**: Sometimes it is appropriate to use humor to keep a conversation alive. Occasionally, a prospect may indicate that you are marketing too strongly, and you may be able to turn that into a humorous situation.

5. **Empathy Helps Persistence**: During the call the prospect may indicate a variety of challenges to the idea of giving. As a caller, you want to empathize with where they are coming from. Take a moment to be human. After that, you may find they are much more open to talking with you about the importance of giving to the campus.

6. **Re-visiting Rapport Aids Persistence**: There are times when it can be helpful to go back to something you learned about the prospects interest during the course of the rapport. By re-visiting this topic, you can keep the call alive and the prospect interested in speaking with you. Then you can gently lead the call back into the ask. The important thing here is not to go entirely back to rapport and keep your focus on the ask.

7. **Importance of Enthusiasm in Being Persistent**: Most prospects are not “waiting” for your call. Therefore, if you can make their day by being enthusiastic and causing them to feel enthusiastic, you will be able to persist and ask at all of the various gift levels.

8. **Tone of Voice in Persisting**: Tone is essential. You have to set an expectation that the prospect should listen to you long enough to hear your presentation. In fact, speaking at an even pace, and not overly hurried, can actually help the prospect know that you respect yourself, and they usually will then show you the courtesy of listening. Make sure to listen to their tone of voice as well to understand them.

9. **Active Listening in Persistence**: In order to respond appropriately to the prospect, you must understand what you are responding to. Therefore, listening to the prospect is absolutely essential.

10. **Know What to Ignore**: Sometimes a prospect will indicate their disinterest under their breath or in a passing comment. True genius is knowing when you can ignore a comment in order to keep the call moving in a healthy direction.

11. **Don’t Take Things Personally**: Let the challenges flow and know you are hired to resolve the problems related to giving. This is why you are here!

12. **Belief Level**: Finally, in order to show true persistence, your own belief in the importance of raising private funding for SLU is key. You must know in your own mind that the quality of education at SLU is dependent, in part, upon the support of alumni, parents, and community members.
*Remember to use what you learn in Rapport. Record on paper if necessary!

**What are you trying to accomplish in the call?**
1. Update records.
2. “Friend” raise.
3. Fund raise.

**Three things to find out during each call:**
1. What is the alum’s **passion**?
2. How do they feel about SLU? **(Affinity)**
3. What do you **have in common** with them?

**Helpful tips and leading questions:**
- Listen
- Ask for Advice
- Tell me more about that…
- That is really interesting. What is that? How does that work? (Ask open ended questions.)

**Saint Louis University questions:**
- I chose to come to Saint Louis University because_______. Why did you choose to attend Saint Louis University?
- What were your favorite things about SLU?
- My favorite thing about SLU is _________. What are some of yours?

**Popular Buildings/Landmarks?**
- Which campus did you attend when you were at Saint Louis University? What building did you have most of your classes in? (Share your experience with that campus and/or building).

**Athletics:**
- Do you follow any of the athletic teams at Saint Louis University? Which ones?
- Have you attended any games or matches since you graduated? Which ones?

**Student Life:**
- Were you in any clubs or activities when you were at Saint Louis University? Which ones?
- I’m involved in __________. Was it around when you were here?
- What resident hall (dorm) did you live in when you were on campus? What was it like living in __________? I live/lived in _____ (share your experience).

**Classes/Majors:**
- I note that your degree/major was_______. Do you work in that field now?
- Currently there is a big focus on internships and study abroad opportunities. Did you have an internship? Study abroad? (share your own experiences)
- Was there a particular professor you liked when you were here? What did you like about him/her?
- What was the most interesting class you took when you were a student?

**Career:**
- I note here that you work for ________, what kind of work do you do? What exactly do you do in that position? How do you feel your Saint Louis University education prepared you for that position?
- What advice would you offer to current students like me about the job market? Career paths?
- Did you work over the summer when you were not at Saint Louis University? Where? What was that like? A lot of current students participate in internship programs over the summer. Some are able to secure jobs with those companies when they graduate. What was your first job out of college?

**Alumni Activities:**
- Have you attended any alumni events (Cardinals game, reunions, basketball games, dinners or receptions)? Which ones? What did you think of _____(insert event)_____
- Do you receive *Universitas*, the Saint Louis University magazine? Did you find any particular articles interesting? Which ones?
Pointers on how to have a GOOD Phonathon Call

- Don't make ASSUMPTIONS…ask probing questions
- Developing RAPPORT is essential to the success of the call - must get comfortable with having a CONVERSATION with the prospect. Remember to use what you learn in Rapport and work it into your script.
- Be INTERESTED in talking to the prospect - you want to hear HIS/HER STORY.
- BE HONEST & CORRECT ON THE FACTS, do not make up stuff/give untruths about anything - if you don't know the answer, let the prospect know you will find the answer and someone will get back to them. Unless you are absolutely sure, don't give out information.
- DON'T AGREE TO JUST AGREE with the prospect - SINCERITY IS IMPORTANT AND ALWAYS RINGS TRUE. Make it Personal.
- Don't say things that you don't believe in.
- TRANSITIONS are important. Have phrases ready that you are comfortable with, e.g. “with that in mind…”
- A RAPID RESPONSE to objections is important.
- Getting comfortable with the format of the script is key - rapport, transitions, overcoming objections, 3-4 ASKS
- Ask open ended questions…Do Not ask yes/no questions
- ALWAYS SAY THANK YOU!
- Always listen to the alum so you can reply to answers/comment or bring up things later in the call…ACTIVE LISTENING.
- Understand the purpose of asking for their e-mail address - what are we going to do with it, and how the prospect will BENEFIT from giving Saint Louis University their e-mail addresses.
- No gum chewing or eating ALLOWED during any call.
- Never argue with alumni. This does not mean, however, that you have to agree with them. Don’t take it personally.
- Don't use words like MAYBE, PROBABLY, I'M SORRY, I'M AFRAID. Stay away from negative or non-confident vocabulary.
- DON'T APOLOGIZE for calling - BE PROUD THAT YOU GO TO SAINT LOUIS UNIVERSITY, and YOU WORK FOR ANNUAL GIVING. IT IS CRITICAL THAT YOU UNDERSTAND THE IMPORTANCE OF SECURING PRIVATE SUPPORT FOR SAINT LOUIS UNIVERSITY. YOU HAVE A VERY IMPORTANT JOB - KEEP IN MIND, YOU MAY BE THE ONLY CONTACT THE PROSPECT HAS WITH SAINT LOUIS UNIVERSITY ALL YEAR.
- THE SAINT LOUIS UNIVERSITY FUND FOR EXCELLENCE is all about the importance of alumni participation every year - we need everyone to make a gift!
“A lot” of money will vary from person to person - don’t decide someone can’t give at a certain level. Your job is to do the asking and negotiating.

People give to rising stars not sinking ships.

Always ask for a SPECIFIC dollar amount. When they object, then they only reject the dollar amount and you can ask them to support at a different dollar amount. As opposed to you asking them to give and they just say NO.

When an alum pledges $25 and you want to go for the STRETCH, thank them 1st! “Thank you for your pledge of $25! Would you like to make your gift go even further and pledge that amount over two consecutive months totaling $50 to support __________?”

Non-Donors haven't been given enough GOOD reasons to give.

A reason to give is understanding and valuing the importance of a college degree both the one that an alumni has and the one that is currently being obtained by our students.

Quickly review the demographical data provided on your screen (age, address, degree info might help you in rapport).

Never say “just a minute more of your time” or “I need one more minute”
  o Be very clear about what you are talking about…Don’t use questions like “what are you into?”
  o People don’t live at P.O. Boxes. Instead say: Is your current address…
  o CONFIDENCE
  o Never say an amount is TOO MUCH or A LOT of MONEY. Instead say that you know that the amount you asked for is a sizeable/significant amount.

DO NOT SAY: Your Money or Your Donation
DO SAY: Your Gift, Your Support and Your Contribution

Forms of the Word Alumni to be aware of:

<table>
<thead>
<tr>
<th></th>
<th>Singular</th>
<th>Plural</th>
</tr>
</thead>
<tbody>
<tr>
<td>Masculine Form:</td>
<td>Alumnus</td>
<td>Alumni</td>
</tr>
<tr>
<td>Feminine Form:</td>
<td>Alumna</td>
<td>Alumnae (alum-nay)</td>
</tr>
<tr>
<td>Both:</td>
<td>Alumnus / a</td>
<td>Alumni</td>
</tr>
</tbody>
</table>

**Alum and Alums are Slang Words
**ALUMNIS is not a word!
TRANSITIONAL PHRASES

- I understand. *(Do not overuse and don’t use when you really don’t understand.)*
- I can relate…
- Let me tell you more about…
- What do you mean by that…?
- I understand, but this fund is so important to Saint Louis University that I would not be doing my job for the University if I did not at least tell you about some of our more comfortable levels and give you the opportunity to get involved. Let me tell you about some of the next levels of support.
- We understand that not all of our alumni can give the same amounts. That is why we offer so many different levels and payment options in order to make it easier to get involved.
- I can see that, but let me tell you about some of our other levels of support because it is so important that we get every alum involved. We understand that not all of our alumni can participate at this level, so let me go through our other ways to participate.
- I understand that. Let me tell you about our participation pledge of $150. Our goal tonight is to get everyone involved in order to reach 100% alumni participation. One option we have for your consideration is to pay your gift over time. You could give $150 in two payments $75 for a total gift of $150. With that in mind, can we count on you for a gift of $150 tonight?
- I understand, but I cannot convey enough to you how important this fund is for the University. Tuition only covers two-thirds of the operational costs to educate one student. Saint Louis University depends on alumni support to make up the difference. Let me tell you about some of our other levels of support. I am sure we can find one that is comfortable for you.
- I see. Tell me a little more about that. *(Allow them to further explain their objection).* That certainly makes a lot of sense, and I completely understand. Let me share with you what many other alumni do when they are faced with a similar situation. They choose to get involved at more comfortable levels. For example…
- I appreciate your sharing that with me, and I truly understand your situation. I would suggest, however, that we still might be able to figure a way out for you to get involved. Many alumni I speak with are in similar situations, and this is what I recommend to them—to get involved at our next level of support…
- With that in mind let me tell you about more modest levels other alums like you are doing.
Generic Reasons to Give

1. Last year, 96% of undergraduates received over $76 million in scholarships and financial aid.
2. To support a value-based Jesuit Education.
3. Adds degree marketability and value.
4. Helping another generation of students.
5. Financial aid, scholarships, and fellowships.
6. Support high quality faculty.
7. Continue to build program reputations.
8. Study abroad and internship opportunities.
9. Student activities, for the well-rounded student.
10. Intercollegiate athletics.
11. Student mission trips to New Orleans, Mexico and El Salvador.
12. Attract the brightest and best students.
13. Honoring what Saint Louis University has done for you.
14. Annual gifts support the entire SLU experience.
15. Annual gifts target the most pressing need; scholarships, teaching, research, health care and student life.
16. Annual gifts help keep tuition affordable and bring leading scholars and scientists who perform landmark research to classrooms.
17. SGA Upper-Class Endowed Scholarship Fund — created by SGA students.
18. Student Quality of Life Improvement Fund — enriches the “out of the classroom” experience.
19. SLU embraces innovative technology and teaching techniques, with computer laboratories and every classroom connected to the Internet.
20. SLU has emerged as a major player in the nation’s strategic plan to battle bioterrorism.
21. SLU enriches the quality of campus life and community with the addition of the Edward A. Doisy Research Center and the Chaifetz Arena and by renovating student housing and recreational facilities and by continuing to improve the campus.
22. For the 4th year in a row, The Center for Health Law Studies has been named the #1 health law program in the country by U.S. News & World Report.
23. The Division of Geriatric Medicine was ranked #12 in the United States by US News and World Report.
24. The part-time MBA program in SLU's John Cook School of Business ranked No. 26 in the country.
25. The Smurfit-Stone Center for Entrepreneurship was named by US News & World Report as the 21st ranked program of its kind in the United States. SLU is the only school from Missouri and the only Jesuit University to be included on U.S. News and Fortune Small Business lists for the best in entrepreneurship education.
26. The Boeing Institute of International Business is the only accredited program of its kind in the Midwest.
27. Over 750,000 hours dedicated to service by the SLU community.
28. 24 law students, along with faculty and alumni, spent their spring break providing pro bono legal services to low income clients in New Orleans who had experienced devastating losses as a result of Hurricane Katrina.
29. First-year students can enroll in SLU's unique "Inquiry Courses," small classes that encourage collaboration and critical thinking.
30. The 2008 edition of U.S. News & World Report's "America's Best Colleges" ranked SLU 82nd out of the 262 national universities, making SLU one of the top-five Jesuit universities in the country.
31. The new Edward A. Doisy Research Center will provide state-of-the-art facilities for health sciences research.
32. The opening of Chaifetz Arena will bring our basketball programs back to campus, thus enhancing the quality of student life and Billiken pride.

*There will be specific list of Reasons to Give for each Phone Campaign.
Saint Louis University
Common Objections

1. “Just send me something. I don’t do business over the phone”
That’s somewhat common. Because we have a higher response rate by phone, we have chosen to get in touch with our alumni this way. If we can find a level that you are comfortable with, we will send you a pledge card in the mail, and you can send your check back in the mail. By sharing an amount tonight, we can begin allocating funds immediately. With this in mind, let me tell you about more modest gifts. (Return to script at next level).

2. “I have children in school right now, and cannot afford to give”
That’s understandable. It seems like tuition goes up a bit each year and my parents and I have to budget more carefully each year in order to pay my bills. Luckily the fact that the alumni and friends of SLU are helping out with their gifts, it assists in keeping our tuition rates reasonable. If tuition were the only source of income for SLU, students would have to pay significantly more each year. As a student, I know that would be very difficult. That is why your support is so critical. (Return to script at next level).

3. “I need to talk it over with my spouse”
I know that is a sizable gift, and you probably would not want to make such a decision without your spouse’s input. Maybe we can find a level that you are sure you and your spouse would be comfortable with, and then if you decide you are able, feel free to increase the amount upon receiving your pledge card. This is what a lot of people I spoke with tonight are choosing to do. Let me tell you about our more modest levels. (Return to script at next level).

4. “I’ll just give a one-time gift of $25 (or any other gift less than <$50)”
Thank you so much for your gift of $_____. I am so glad you are willing to support Saint Louis University this evening. We very much appreciate your gift. One option that we do have for your consideration is to pay your gift over time. If you want to make your gift go even further, you could give $25 in four payments for a total gift of $100. This would help us out so much because. (GIVE A REASON TO GIVE AND RETURN TO SCRIPT).

5. “I have a degree from another school, and only support them”
It seems like more and more people are getting degrees from multiple schools. It’s great that you had the opportunity to do that, and I am sure that SLU played an important role in your education. Because I know how important alumni funding is to every college, I don’t want you to give to Saint Louis University instead of (other school), but I would like for you to consider helping us as well. Let me tell you why your support is so critical. (Return to script at the next level).

6. “I am planning to go back to school. I cannot give right now”
I think that it is great that you are going to further your education. Where are you going? Great. I am sure that your undergraduate degree from SLU did a great job in preparing you for graduate school. We have very strong programs and a great reputation, but if it were not for outside support from alumni like you, we might not have these great things going for us. That is why your support tonight is so important. (Return to script at the next level).

7. “I don’t use my degree from SLU anymore because I am working in a different field”
I understand. In fact, more than half of all college graduates go into professions outside of their field of study. I am sure, however, that you are using at least some parts of your degree from Saint Louis University, or some of those things you learned outside the classroom. Please consider making a gift to SLU tonight as we are hoping to continue to improve your alma mater in order to maintain the value of a SLU degree. Let me explain how your support could assist us. (Return to script at the next level).
8. **“This just isn’t a good time for me. Try back next year”**
I understand your reluctance to give that much. However, there are other more comfortable levels that our alumni have found to be more affordable. There are many reasons to get involved this year with SLU, let me share just a few. (Return to script at the next level).

9. **“I am retired and on fixed income”**
Congratulations! What have you been doing with your time? As a student I understand the importance of maintaining a tight budget. One thing a lot of our retired alumni are doing is breaking their gifts into monthly or quarterly payments to make the gift more manageable, while still providing support to the next generation of SLU students. Let me share with you how your gift would really help us. (Return to script at next level).

10. **“I am unemployed”** **Do NOT dwell on the fact they are unemployed**
I am sorry to hear that. Are you on an active job search?
If No: What are you doing with your time?
If Yes: You should try contacting our Career Center on campus. They would be a great resource to help you find some leads. Would you like their number? (314) 977-2828.

By getting involved tonight, your gift will help ensure that SLU can continue to offer support and services to alumni, such as the Career Center. I have spoken with other alumni who are in your situation, and they have decided to get involved with more comfortable gifts to SLU. They have also broken those gifts into payments. Let me tell you about those more comfortable levels of support. (Return to script at the next level).

11. **“I just graduated and am still paying student loans”**
That’s understandable. I am going to be paying off loans for a while after I graduate as well. The great thing about supporting Saint Louis University is that it helps keep tuition costs down, so that our students don’t have to pay back as much when they graduate. Do you remember how much tuition was when you were a student here? This year tuition is over $28,000 and this only covers two-thirds of what it actually costs to educate one student at SLU. (With room and board, it costs almost $37,000 to attend SLU this year.) Just think how much more we would have to pay back if alumni did not give back to SLU. With this in mind, let me tell you about our more comfortable levels and some payment options we have. (Return to script at the next level).

12. **“My credit card bills are out of control, along with my other bills, there is no way I can give to SLU this year”**
I know what you mean. As a student I have learned to stick to a tight budget. Since we are a private school, the budget here at SLU is pretty tight too. That’s why we depend on the financial support of alumni and friends of Saint Louis University. Let me tell you about our more comfortable levels of giving. (Return to script at the next level).

13. **“I only hear from SLU when they want money, so I am not interested”**
I understand, but I just want you to know that one of our main goals in calling you tonight is to get our records updated and let you know all about the great things happening on campus. (Build more rapport--Do you receive the alumni magazine--Universitas?) It would not be possible for us to have great SLU alumni programs without alumni support. Therefore, we do combine a chance to let you know about campus events and changes along with getting you involved with supporting Saint Louis University.

14. **“I have never returned to campus”**
That’s too bad. If you have the chance, I highly encourage you to do so. SLU has made so many improvements to the campus in the last few years. The campus is actually one of the reasons I chose to come to SLU. The Doisy Research Center will be completed later this year and the on-campus Arena will be ready for commencement in 2008. By contributing to the Fund for Excellence tonight, your gift will help SLU to further improve its facilities while continuing to offer high quality academic programs.
15. “I had to work my way through college without any help from others, I am not going to help anyone else now”

I completely understand. I am working at the Phonathon in addition to taking classes in order to pay my way through school. Thankfully, SLU alumni and friends have helped to keep tuition lower by providing the college with much needed operating funds as well as scholarship funds. You may not be aware of the fact that alumni support assisted even when you were a student here. As hard as you had to work to pay your bills, imagine how much higher your tuition would have been without alumni support. That is why alumni support is so critical.

(Return script and start at next level).

16. “I give to other charities that are more important than SLU”

(Ask about the other charities and build more rapport about them.) It is great that you support those important organizations and programs. We would never ask that you give to SLU instead of those projects. We only hope that you would consider making SLU a part of your charitable giving this year, even at a more reasonable level. And, let me tell you why your gift is so critical. (Give reasons to give and return to script).

17. “Just bought a house”

Congratulations. I hope you are very happy in your new home. Let me tell you about what other alumni in your situation decide to do. They support SLU with a more reasonable gift. (Return to script at the next level).

18. “Just had a baby”

Congratulations. Someday maybe she/he can attend SLU also. Let me tell you what some of our alumni in similar situations to yours are doing. They are supporting us at more comfortable levels. (Return to script at the next level).

19. “I did not like my time at SLU”

I can understand that not everything about your time here was pleasant. Was there a favorite professor you had here at Saint Louis University? (WAIT FOR NAME). That is great. Why did you like her/him? One thing you could do tonight is make a gift in honor of professor ______. That would be a great way of celebrating what you did like about SLU, while honoring someone who made a difference in your life. (Return to script at the next level).

(Record reason the prospect is unsatisfied).

20. “I am not connected to SLU, I was a commuter”

So, as a native of the area, you were very lucky to have SLU right here in your backyard. I think one of the best benefits of SLU is being right here in Saint Louis. Many of our alumni did the same thing that you did—commuted and benefited from not having to pay for room and board. Regardless of whether or not you live on campus, your support of SLU benefits all students. Let me tell you more about our more modest levels of support. (Return to script at next level).

21. “I won’t give because I do not like the president.”

I am sorry you feel that way. However, there are many great things about Saint Louis University, including faculty, bright and dedicated students, and the overall college experience. In fact, I think Saint Louis University is about more than just one particular person, it really is all about many great people. I’d hope that you’d still want to support students, quality faculty, and the great research that happens here on this campus everyday. Gifts to Saint Louis University can be designated to specific areas, ensuring your gift is used by the unit on campus that you care most about. Let me tell you why your support is so important. (Return to script at same or next level).

22. “SLU has become too liberal/conservative.”

I am sorry to hear that you feel that way. However, there are many great things about Saint Louis University, including faculty, bright and dedicated students, and the overall college experience. As a student, I think one of the greatest aspects of being here at SLU is the great diversity of thought and people. I find it enriching that many viewpoints can be shared all across campus, allowing each of us as individuals to make up our own minds about different situations. It’s been my experience that SLU encourages all sides of issues to be heard. By making a gift tonight, however, you can support specific areas of the campus that you value. Let me tell you more about how your support can help. (Return to script at next level).
23. “I am a teacher (or I work at SLU). I give back already.”
Well, then, you of all people truly understand the importance of advancing excellence in education. As a student, I really appreciate the work that you do. Let me tell you how other teachers (or SLU employees) are participating this year.

24. “The economy (or stock market) is down.”
I understand. Many other alumni have decided to spread their gifts over two or four consecutive months. Let me tell you why your gift is so important to SLU. (Give reasons to give and promote payment plan.)

25. “Are you calling for money.”
I’m actually calling for several reasons. I’m calling to update our records and to tell you about some of the exciting things happening on campus, including the Fund for Excellence.

26. “Are you a telemarketer?”
No, I am a student and fundraiser and I’m calling to update your records and to tell you about the School/College Annual Fund.

27. “You are not supposed to be calling me, I signed up for the Do Not Call Registry?”
Sorry for the confusion, but as an educational institution and charitable organization, SLU is exempt from the Do Not Call List. I am excited to share all of the important things going on here at SLU. Also, you can be assured that any information that you share will be kept confidential.

28. “The alum you are looking for is deceased.”
I am so sorry to hear that. On behalf of the University, my condolences go out to you and your family. Would you like me to pass his/her name on to the Jesuit community here at SLU so that prayers will be offered for him/her, you and your loved ones? Again, I am deeply sorry for your loss and my prayers are with you. (End call) (If YES, make a note in the comments section and we will pass it on to the SLU Jesuit community.)

29. “My son/daughter did not get accepted to SLU so I will not give.”
Where else did he/she apply? Was it one of his/her top choices? (Listen for response.) [Alum’s child’s school] is also a great school and if he/she is interested, he/she could possibly transfer to SLU in the future. (Continue with the call and give reasons.)

30. “I’m angry about the Allied Health and School of Nursing merger.”
The Schools of Nursing and Allied Health, which originally split in 1979, rejoined in January 2005 to form the Edward and Margaret Doisy College of Health Sciences. By incorporating the two schools back into one college, SLU is putting the primary focus on patient care and support.

The School of Nursing and the former Allied Health departments remain as separate units within the college. The merger will help SLU achieve excellence in educating health care professionals.

Discussions have already commenced about developing core courses genetics, ethics, forensics and health economics to ensure that SLU students remain on the leading edge of health professions education.

(Clinical Laboratory Science; Health Informatics and Information Management (formerly Health Information Management; Nutrition and Dietetics); Medical Imaging and Radiation Therapeutics (formerly Nuclear Medicine Technology); Physician Assistant Education; Occupational Science and Occupational Therapy; and Physical Therapy.)

The College now has a total enrollment of 1200 students in undergraduate, post baccalaureate professional and graduate programs.
31. “I'm angry about the Vagina Monologues.”
   (If asked, NO proceeds go to Planned Parenthood.)
   - It is not an official presentation of the theatre program.
   - Every dollar raised goes directly to charities that help abused women.
   - Karen House, a local Catholic charity founded by a nun, helps abused women.
   - Women's Safe House, a non-profit agency in St. Louis, shelters abused women.
   - Some proceeds also benefit the international charity Women in Iraq.
   - Many leading Catholic universities have performances, including Georgetown, Notre Dame, Loyola-Chicago, Boston College, DePaul and Fordham.
   - The production is student-led and student-funded.
   - Prior to the performances, special forums examined the issue of violence against women.
   - Following each performance, a panel of experts discusses issues in the play in a thoughtful and respectful way.

32. The Rec Center fees have gone up.
The Rec Center fees went up in August after completion of Phase One of major renovations. The new space includes more than 200 new pieces of fitness equipment, a juice bar and lounge, additional locker rooms, several multi-purpose rooms, full wellness suite, climbing wall and gaming area. The lobby, locker rooms, and special event rooms are currently being renovated. A new elevator has also been installed. To help offset the costs of the renovations, for the first time in more than six years, membership rates for Saint Louis University's Simon Recreation Center are increasing. With the new rates, SLU remains competitive with other institutions, where the cost could be as much as $450 a year. (For more information, visit http://www.slu.edu/organizations/crcisc/ or call 314-977-3181.) With this in mind, let me tell you about more modest gifts. (Return to script at next level).

33. SLU doesn't need money with an endowment of almost $1 billion.
This year tuition is more than $28,000, which only covers two-thirds of what it actually costs to educate one student at SLU. (With room and board, it costs almost $37,500 to attend SLU this year.) Just think how much more we would have to pay if alumni did not give back to SLU to help offset the cost of our education. Scholarships continue to be top priority here on campus; 96% of undergraduates received over $76 million in scholarships and financial aid. With this in mind, let me tell you about our more comfortable levels and some payment options we have. (Return to script at the next level).

34. Consider the increased cost of my basketball season tickets as my gift.
For the last decade, the best 200 seats in the Scottrade Center required an annual gift of either $1,750 or $1,250 per seat on top of the cost of the season ticket. In Chaifetz Arena, the best 2,700 seats will require a per seat gift each year on top of the cost of the season ticket, ranging from $150 for the Billiken Red section to $3,500 for the Loyal Blue Table seats. This pricing was based upon many factors: amenities associated with each section, what other similar athletic departments are doing, the practice of the Billiken Club Priority Points System and revenue requirements to pay for the construction of the $80.5 million Arena. Tuition dollars will not be used to pay for Chaifetz Arena and premium seating has always been part of the plan to help pay for the facility. It is also important to remember that more than 70% of the seating will not require a gift, so there are season ticket options for all Billiken fans. And with the configuration of Chaifetz Arena, all seats will be closer to the action than at Scottrade Center. With this in mind, let me tell you about more modest gifts. (Return to script at next level)
SLU Points of Pride
Building Projects and Alumni Relations

• Homecoming 2007 will be taking place September 28-30. For more information or to register, go to http://www.slu.edu/alumni/homecoming.html, or call 314-977-2250.

• SLU’s 8th Annual Easter Egg Hunt will take place Saturday, March 22, 2008 from 11-1. Children ages 1-10 are welcome. Register online at http://www.slu.edu/alumni/easter.html

• The $81 million Edward A. Doisy Research Center is near completion and scheduled to open later this year. The center is located at the corner of Grand and Choteau where areas of research will include modular laboratories for liver, cardiovascular and pulmonary, cancer and molecular biology, infectious diseases, bio-defense and vaccine development research. For more information visit http://researchbuilding.slu.edu/

• Earlier this year SLU opened a modern 39,000 square foot fitness addition to the Simon Recreation Center featuring more than 200 new workout machines including tread-mills, elliptical trainers, stair-climbers, upright and recumbent bikes, and many new pieces of strength equipment, including a full line of Nautilus machines. The space also includes a juice bar and lounge, additional locker rooms, several multi-purpose rooms (featuring spinning, yoga, Pilates, aerobics and other fitness classes), full wellness suite, bouldering wall, dozens of wall-mounted plasma televisions and a gaming area. The second phase of the project is underway and includes renovations to the main level and the second floor. The entire project is expected to be completed later this year.

Ratings

• The 2008 edition of U.S. News & World Report’s "America's Best Colleges" ranked SLU 82nd out of the 262 national universities, making SLU one of the top-five Jesuit universities in the country.

• Saint Louis University’s health law program is ranked No. 1 for the fourth consecutive year in U.S. News' "Best Graduate Schools 2008" issue. Four of SLU's health specialties ranked in the top 25: public health, health administration, geriatrics and physician assistant education.

• The Princeton Review listed SLU among the nation's top institutions in its "Best 361 Colleges 2007" guide, which recognizes only 15 percent of all four-year colleges in the nation. SLU also was honored on the "Best of the Midwest" list.

Athletics

• The new 10,600-seat multipurpose Arena will be named in honor Dr. Richard A. Chaifetz (SHAY-fetz) (AS ’75) who made a $12 million naming rights gift to the Arena. The Chaifetz Arena will open in March 2008. Follow Arena Construction Progress with Interactive Web Cam at http://clayco.oxblue.com/cam5/.

• Rick Majerus was announced as the men's basketball head coach. Majerus is the Billikens' 24th mentor in the program's history. Prior to working as a college basketball analyst for ESPN for the last three years, Majerus amassed a 422-147 career head coaching record. When coaching a full season, he has missed the postseason just two times in 17 seasons.

• Rick Majerus recently announced that Porter Moser will join the Billiken men's basketball staff as an assistant coach. The former Creighton guard was the head coach at Illinois State from 2003-04 to 2006-07 after a three-year stint as the head coach at Arkansas-Little Rock.

• Saint Louis assistant men's soccer coach Mike Sorber has been named assistant coach of the U.S. Men's National Team. Sorber, who played four seasons for the Billikens and spent the last six years as an assistant coach,
will still be involved with the program in a volunteer capacity. A national search for his full-time replacement is currently being conducted.

- SLU senior catcher Bill Musselman was selected in the 30th round of Major League Baseball's First-Year Player Draft today by the Arizona Diamondbacks. He is the Billikens' first draft pick since 2002 and the first not drafted by the St. Louis Cardinals since 1998. Musselman becomes the second SLU player drafted by the Diamondbacks after the organization took Tony Hausladen in the 19th round of the 1997 draft.
- Pitcher Ryan Bird signed as a free agent by the Toronto Blue Jays earlier this summer and is playing in the Gulf Coast League.

Arts and Education

- The establishment of new centers of excellence at Saint Louis University is part of a $1 million academic initiative designed to strengthen areas where SLU already has national prestige and recognition. The initiative has helped launch three brand new centers: the Center for Environmental Science, the Center for Aging Successfully and the Walter J. Ong, S.J., Center for Language and Culture. It also will help take one existing center - the Center for Medieval and Renaissance Studies - to even greater heights.
- The International Center at Saint Louis University has announced our newest study abroad program: SLU in Australia, based in the Gold Coast at Bond University.
- The 2007-2008 University Theatre is presenting four main stage productions including: Language of Angels, Hedda Gabler, YOU’RE A GOOD MAN, CHARLIE BROWN, and Kid Simple. For more information, visit http://www.slu.edu/theatre/0607.htm. The Theatre season begins with Language of Angels. It will be showing September 28th and 29th, October 5th, 6th, and 7th at 2pm.
- "The Elusive Light Michael Eastman Retrospective at the Saint Louis University Museum of Art opened on February 23, 2007 and is open until December 2007. The exhibit is free and is open to the public Wednesday to Sunday from 11:00 a.m. to 4:00p.m. Elusive Light is the first retrospective of internationally renowned photographer Michael Eastman and features photography drawn from his archive. The exhibition will present acclaimed photography from the America, Cuba, Horses, Rodin, Abstractions, and Palladiums series as well as photography from Eastman's earliest days as a photo-artist. Eastman is a St. Louis native (b. 1947) whose work is held in prestigious collections throughout the country including the Art Institute of Chicago, the Metropolitan Museum of New York, the Los Angeles County Museum of Art and the Boston Museum of Fine Art. His work has been featured on the cover of Time magazine four times and Horses, published in 1999, entered its fourth edition in 2003. You can get more information at http://sluma.slu.edu/.
- Saint Louis University's Museum of Contemporary Religious Art (MOCRA) will be host to the exhibition The Celluloid Bible in the fall. The exhibition explores how the Bible has been visualized in film by bringing together over 50 vintage movie posters that survey films from 1898 to the present, along with a selection of additional promotional and commemorative materials. This will be displayed from September 16 to December 9, 2007. For additional information, visit http://mocra.slu.edu.

Community Service

- SLU Campus Kitchen, part of the national Campus Kitchens Project, will be one of 11 current branches that will share a $175,000 grant from the General Mills Foundation over the next three years. In addition, the General Mills Foundation has presented the organization with a challenge grant, where the foundation will match funds raised by the Campus Kitchens Project up to $137,500 over the next three years.
SLU will hold the 10th Annual “Make a Difference Day” on October 27, 2007. "Make a Difference Day" represents just a small fraction of the more than 750,000 total hours of volunteerism completed annually by members of the University community.

College of Health Sciences Points of Pride

School of Nursing
- The Doctorate in Nursing Practice (DNP) Curriculum will be presented in the fall 2007 for approval.
- The school has adopted the Interprofessional Education (IPE) Courses in the undergraduate program options (accelerated and traditional).
- The Ph.D. program will now offer a conversion of the summer semester and online option to an all online option.
- There were enrollment increases of 104% in the undergrad programs and 126% in the grad programs since fall 2005.

Nutrition and Dietetics:
- In addition to the ongoing development of sustainable cuisine through its Fresh Gatherings Café, the Department of Nutrition and Dietetics has a booth at the Clayton Farmers Market offering locally grown produce from the SLU campus garden and artisan breads baked by SLU culinary arts students.
- The department of Nutrition and Dietetics has acquired management/administration responsibilities of the Barnes Jewish College of Nursing and Allied Health Dietetic Internship and Graduate program.

Clinical Laboratory Science:
- The Dept of CLS has recently acquired the Cytotechnology and Clinical Laboratory Sciences programs from Barnes Jewish College of Nursing and Allied Health with applications for the new Cytotechnology programs being accepted beginning fall 2007.

Medical Imaging and Radiation Therapeutics:
- Formerly known as the Department of Nuclear Medicine Technology, the new name reflects the recent addition of the Radiation Therapy Program from Barnes Jewish College Nursing Program to the existing Nuclear Medicine Technology curriculum at DCHS.
- William Hubble, MIRT, accepted an Editorial Consultant position with Advance for Imaging and Radiation Therapy Professionals; he will be responsible for the nuclear medicine column “View from the Hot Room.” Advance is printed biweekly and has the largest subscription base for radiological professionals in the country.

Health Informatics and Information Management:
- Formerly known as the Department of Health Information Management, this department has responded to current trends in healthcare by increasing graduating student’s levels of knowledge, experience, and application skills in data mining and databases: Health Informatics. Thus the new name “Health Informatics and Information Management” reflects its commitment to innovatively respond and remain competitive in providing these needed skills.
Physician Assistant Education:
• In response to increasing demands of the various medical professions that the Department of Physician Assistant Education serves curricular innovations have been implemented.
• Four second-year PA students were among those recently inducted into Alpha Eta, the scholastic honor society for the allied health professions.

Occupational Science and Occupational Therapy:
• The department has increased enrollment 141% between 2004 and 2006 with strong indicators and projections for successive years due to acceleration of efforts to coordinate planning with area community colleges to develop a bridge program for baccalaureate degree completion.
• The department was ranked 34th out of 150 graduate OT programs by the *US News & World Report* "Best Graduate Schools 2006."
• The Department of Occupational Science & Occupational Therapy is one of three U.S. programs invited to collaborate with the European Network of Occupational Therapy in Higher Education (ENOTHE) proposal.
• Dr. Ismahan Moheisen Chambers, class of 2002 and Katie Holmes, OTR/L class of 2003, SLU Soccer team members in 1999, were inducted into the Billiken Hall of Fame February, 2007.

Department of Physical Therapy:
• The department continues to develop and implement their new Doctorate in Physical Therapy (DPT) curriculum. Students who have completed a BS or MPT degree in Physical Therapy may enter the transition (tDPT) program which requires and additional 18 additional credits and will be offered in a part-time distance learning format.
• Students with a BS degree after the summer of 2006 will earn a Doctor of Physical Therapy (DPT) degree at the culmination of a 3 year program.
• An athletic training education program has been approved and is an exciting addition to the department. This program, to begin in the 2008-09 academic year, is designed as a five year entry-level masters curriculum. This program requires close ties with Billiken Athletics and the new Chaifetz Arena will house outstanding sports medicine facilities.
• Nancy Uschold (AH ’86) received the Florence Kendall Service Award. This award recognizes a physical therapist that has performed outstanding service to the health care community in the area of clinical practice, education, professional association, and/or health care advocacy.
• Irma Ruebling MA, PT stepped down after 30 years as chair of the Physical Therapy Department and assumed a new role as the Doisy College of Health Science’s Interprofessional Education Curriculum director.
• In celebration of the 50th Anniversary of the Program in Physical Therapy a student scholarship was established in honor of Sister Mary Imelda Pingel (AH ’42 and ’69).

The Doisy College of Health Sciences Fund will be used towards:
• The Doisy College of Health Sciences Fund is the backbone of support, providing Dean Charlotte Royeen the flexibility to meet the immediate needs of students, faculty, and alumni and to respond to financial needs. Enhancement of the fund is an especially good fiscal management tool in hedging against future anticipated cuts in spending allowances on endowed funds, and is a key component in maintaining the College's operating budget.
• In addition to meeting overall operational needs, Dean Royeen considers support of the Doisy College of Health Sciences Fund as critical to the funding needs of two innovative programs underway:
  • The “Center of Excellence in Interprofessional Curriculum Design" In response to an increasing awareness and demand for multidisciplinary collaborative knowledge and skills,
Doisy College of Health Sciences is leading the establishment of The “Center of Excellence in Interprofessional Curriculum Design.” Through support of the Doisy College of Health Sciences Fund, this center is dedicated to the design of teaching, research, practice, and service opportunities which develop knowledge and understanding of each profession’s contribution to the improvement of the quality and efficiency of patient care.

- Fresh Gatherings Café is an innovative model for sustainable cuisine within an institutional environment. The menus are developed from local and seasonal produce and livestock of farmers within 100 miles of the campus, and the department of Nutrition and Dietetics’ own organic garden on campus. Fresh Gatherings provides a living classroom and is the cornerstone for the culinary curriculum of the Nutrition and Dietetics program. Through support of the Doisy College of Health Sciences Fund and a grant from the USDA, this program is dedicated to the practice of organic farming methods and humane husbandry; is a pioneering enterprise in farm to cafeteria efforts; and provides education and consultation services to area programs, including public school systems.

OTHER DESIGNATIONS:

HEALTH PROFESSIONS
- Florian and Walburga Horvath Memorial Scholarship- In memory of the parents of Dr. Frances Horvath, Dean of the School. The scholarship is for financially needy, full-time health sciences students who achieve academically and have saved personal funds for college.
- Physical Therapy Academic Fund
- Sr. Imelda Pingel Scholarship- Established by the alumni and friends of the Department of Physical Therapy for students in the department.
- Physician Assistant Education Academic Fund
- David W. Wagner Memorial Scholarship- In memory of the Chairman of the Department of Physician Assistant Education who died of leukemia at age 49.
- Nutrition and Dietetics Academic Fund
- Sr. Mary Carola Sellmeyer Endowed Scholarship Fund- (Nutrition & Dietetics)
- Health Informatics and Information Management Academic Fund
- Sr. Mary Servatia Risse Scholarship Fund- (Health Informatics and Information Management)
- Clinical Laboratory Science Academic Fund
- Sr. Mary Dolorosa Pope Endowed Scholarship Fund- (Clinical Laboratory Science)
- Medical Imaging and Radiation Therapeutics Academic Fund (formerly Nuclear Medicine Technology)
- Occupation Science and Occupational Therapy Academic Fund

SCHOOL OF NURSING
- School of Nursing Academic Fund
- Tradition of Excellence - provides scholarships for graduate and undergraduate nursing students.
- Shaw-Engler Endowed Scholarship - for Ph.D. nursing students.
- Clarice Tierney Scholarship and Loan Fund provides support for Accelerated Option Program nursing students and honors the founder of the program.
INTRODUCTION:
Hello, this is ____________ from Saint Louis University; may I please speak to Mr./Mrs. ____________? 
Hello, Mr./Mrs. ____________, I am a (class year) at Saint Louis University studying (major) and I'm calling on behalf of the Doisy College of Health Sciences. How are you this evening?

I am calling tonight for several reasons. First, I'd like to update your records. Is your current address ____________________________? 

If EMAIL listed:
Is your email still ____________________________?

If NO EMAIL listed:
To help alleviate printing and mailing costs, we are integrating more e-mail into our communication with alumni and want to make sure we have your current information. We also offer the monthly Billiken e-bulletin so you can stay up-to-date with upcoming events, news and information. What is your e-mail address?

If BUSINESS information listed:
I note here that you work for ____________. Is that your current employer?

If NO BUSINESS information listed:
I see that we do not have an employer listed here for you. Here at Saint Louis University we like to keep track of where our alumni are working. Where are you employed at this time?

RAPPORT Starter Ideas:
• TELL THE ALUMUS A LITTLE BIT ABOUT YOURSELF to initiate conversation
• Discuss the alum's area of study and how it pertains to their current situation.
• Share experiences of your SLU experience and find some common ground.
• Ask for advice if you find something of similar interest.
• SEE RAPPORT IDEAS SHEET AND PHONATHON POINTERS

SPECIFIC RAPPORT IDEAS:
• I see here your major was ____________, correct? How did that degree/those classes help you in your career?
• When was the last time you were back on campus? What was the occasion?
• I came to SLU because______. Why did you choose to attend SLU?
• Tell me about your time at SLU? What were some of your favorite aspects of being a student here? What were your favorite courses? Favorite professors?
• Which activities were you involved in on campus?
• What kind of work do you do?
TRANSITION:
Thank you for sharing all of this information with me. It is critical that SLU stays in touch with its alumni.

Well, Mr./Ms. ________, another reason I am calling you tonight is to let you know of some of the exciting things happening here on campus and in the Doisy College of Health Sciences.

In the constantly evolving world of healthcare, the Doisy College of Health Sciences is continually responding to the ever changing educational and clinical needs of these health professions. For example, plans are underway to move the level of preparation necessary for advanced nursing practice to the doctorate level (Doctor of Nursing Practice- DNP). An athletic training education program within the department of Physical Therapy will begin in the 2008-09 academic year. Eight new courses in the department of Physician Assistant Education have been offered for the first time and ten more are in the late stages of development. As you can see, many of the departments are making great advancements and the College really has a lot of momentum. Of course all of these great things would not be happening if it were not for private support from alumni like you.

THE ASK:
$500
Scholarship support continues to be a top priority of the College, including scholarships like the Horvath Memorial Health Professions Scholarship and the Tradition of Excellence Scholarship in Nursing. SLU is committed to providing need-based and merit scholarships to current students. With this in mind, can we count on you for a special gift of $500 tonight to help students?

IF NO: I certainly understand, we only ask at that level as an indication of our need.

$250 (TRANSITIONAL PHRASE NEEDED)
One of the major advances in preparing our graduates to meet the demands of the healthcare industry has been the development of an Interprofessional Curriculum, which integrates 11 health professions, 100 faculty, and 1200 students. As the College responds to change and provides students with greater opportunities, ongoing operational needs continue and unrestricted financial resources are needed to sustain these necessary operations. With this in mind, can we count on your support this year to the College with a gift of $250 tonight to support this and many other programs in the college?

IF NO: Once again, I do understand.

$125 (TRANSITIONAL PHRASE NEEDED)
The Doisy College of Health Sciences Fund is the backbone of support, providing Dean Royeen the flexibility to meet the immediate needs of students, faculty, and alumni. Your gift will provide this vital funding and is a key component in maintaining the College's operating budget. With this in mind, can we put you down for a gift of $125?

"BE TRUE BLUE GRAD YEAR PARTICIPATION GIFT" (TRANSITIONAL PHRASE NEEDED)
Last year, alumni gifts of $100 or less totaled more than $760,000, so you can see that participation at all levels is vital to the SLU experience. US News and World Report measures alumni giving for national rankings and corporations also evaluate alumni participation before deciding to make gifts to SLU. We need to be able to show that more of our alumni support SLU each year. Many alumni are choosing to participate with a "Be True Blue Grad Year Participation Gift". Since you graduated in <<YEAR>>, your Grad Year Participation Gift of $<<YEAR>> per quarter for a total gift of $<<YEAR x 4>> this year would go far to help support students at Saint Louis University. With this in mind, can we count on you for a "Be True Blue Grad Year Participation Gift" this year?
IF NO TO PLEDGE:
Okay, I understand. Thank you for your time tonight. Maybe the next time we call will be a better time for you. Good night.

IF YES TO PLEDGE:
Thank you for your commitment of $_____. We really appreciate your support.

IF DIVIDED INTO PAYMENTS BY CHECK:
Thank you so much for your total gift of $_____ to be paid in monthly/quarterly/annual payments of $_____. We'll send you a pledge card and reply envelope tomorrow for your first payment. You will receive reminders for the remaining payments (monthly/quarterly/annual, etc.).

1) Will you be using your MasterCard, VISA, Amex, or Discover?
My supervisor is here with me and she/he would like to thank you for your support and take your credit card information.

(Flag down a manager to take the credit card information and they will complete the call for you.) (For Managers: May I have the number on your (type of card)? And the expiration date? And your name as it appears on the credit card?)

IF NO: We process thousands of credit card gifts every year. With clerical and postage costs on the rise, we've found the most cost effective and convenient way for you to fulfill your gift is by using a credit card. And your gift goes to work right away. Will you help us tonight by putting your gift on a credit card? (If YES, flag down a manager to take the credit card information and complete the call.)

IF STILL NO TO GIFT ON CREDIT CARD: I understand. We'll just send a pledge card in the mail for $____ tomorrow. We'll include a return envelope so you can send us your check. Be sure to designate the fund of your choice.

IF DIVIDED INTO CREDIT CARD PAYMENTS:
Thank you so much for your total gift of $_____ to be paid in monthly/quarterly/annual payments of $_____. Tonight we'll put your first payment of $_____ on your (MC/VISA/AMEX/DISC). The remaining payments will be charged to your card (monthly/quarterly/annual, etc.). My supervisor is here with me and she/he would like to thank you for your support and take your credit card information.

2) GET EMAIL IF YOU DIDN'T EARLIER IN THE CALL:
Do you have an email address so that we can send you a confirmation email tomorrow?

(IF HESITANT) To help alleviate printing and mailing costs, we are integrating more e-mail into our communication with alumni and want to make sure we have your current information. (If the alum is weary about giving their email, you can assure them that it will not be given to outside sources and will only be used for pledge confirmation, newsletters and alumni event updates.)

3) Do you or your spouse work for a matching gift company?
IF YES TO MATCHING GIFT: Great! Please let your Human Resources department know you have made a pledge to Saint Louis University, and they will give you the necessary paperwork to fill out. You may also visit http://www.matchinggifts.com/saintlouis/ and search for your employer; many companies have links to their matching gift form which you can print and mail in with your gift. Thanks again for your gift of $_______.

IF NO TO MATCHING GIFT: Okay, thanks for verifying that. And, thanks again for your support.

IF UNSURE ABOUT MATCHING GIFT: You may visit http://www.matchinggifts.com/saintlouis/ to search for your employer; many companies have links to their matching gift form which you can print and mail in with your gift.

4) FINAL CONFIRMATION for non-credit card gifts:
Thank you again for your commitment of $_______ to the ____________ Fund.
I, __________________________________, have read and understand the contents of the Office of Annual Giving Programs Policies and Procedures Manual particularly the Student Worker Policies on pages 11-14. I also understand that all donor information is to be kept confidential. Further, I understand that my employment can be terminated at any time.

______________________________       _____________________________
SIGNATURE           DATE