Carnegie Mellon University

Andrew Carnegie Society Leaders Training

March 1, 2011
Welcome

Welcome and Introductions, Greg Polansky, ACS President

- Overview of ACS Leaders
- Goals for today’s session
- Program materials and support
The ACS Mission

The Mission of the Andrew Carnegie Society is to recognize annual leadership giving to Carnegie Mellon University while growing and sustaining annual gifts through education and engagement.
ACS Leaders Goal

To increase the number of ACS members and gifts to the Annual Fund at the ACS level through building and maintaining long-lasting relationships.
How?

Build a personal peer-to-peer relationship with ACS members

- Sense of community
- Maintain connection to the University
- Increase awareness of CMU’s operations, success, vision and direction
- Increase general understanding of philanthropy, its impact broadly and at CMU
- Provide gateway for ACS members to get further engaged
Your Role / Expectations

10 – 3 – 100

- Build relationships with your 10 ACS members
- Speak to each at least 3 times per year
- Achieve 100% of your goal
  - 1st year retention
  - Move members to higher annual gift through Legacy Scholarship program
Where to Begin

Let’s review the package you received:

1. Welcome Letter from Greg Polansky
2. ACS Leaders Job Description
3. ACS Leader Program Overview
4. ACS Leaders Volunteer Agreement
5. Volunteer Confidentiality Agreement
The Essentials

• Remember
  - Every phone call is an interruption – get their permission
  - If this is not a good time – ask to schedule a time to talk – make an appointment
  - Your calling to get acquainted – not to ask for gift
  - You are there to learn, not instruct. Best gauge of success is they are talking 80% of the time.
Preparing for the First Contact

1. Review the profile
2. Look for a place to start conversation
3. Do your research
4. Determine what you would like to learn
5. Get in a relaxed position – *this is not a business meeting*
6. Smile 😊
7. At all cost – *avoid injury*
The Call

1. Ask permission – give them an expectation of how long – 5 minutes? 10? more?
2. Explain why you are calling
3. Build reciprocity – offer information about CMU tied to who they are from their profile
4. Share your experience(s)
5. Confirm contact info
6. Share your contact info
7. Let them know you will be staying in touch
Questioning – Keys to Success

• Review tool in kit
• Be empathetic
• Most people do not get a chance to talk about the most important person they know - themselves
Document the Call

- Complete any information on the profile
- Note starting point for next call