Andrew Carnegie Society
ACS Leaders Training: Beyond 101
Andrew Carnegie Society Mission Statement:

...to recognize annual leadership giving to Carnegie Mellon University while growing and sustaining annual gifts through education and engagement.
Agenda
ACS Leaders Training: Beyond 101

Welcome & Introductions
Panelist Presentations
  ▪ Making the Call
  ▪ Working with your Gift Officer
  ▪ Connecting with your Corporation
Discussion Topics
Q&A
Session Objectives

• Provide new volunteers with tips and overviews of how to get started

• Share “stories from the road” to provide examples of different ways for more advanced volunteers to get more involved

• Collect and address questions about peer-to-peer volunteer fundraising
Making the Call
The Mechanics of Getting Started

Gena Henry
Andrew Carnegie Society Gift Officer
– Territories: Central PA, Portland, San Francisco, & Seattle
Making the Call

- Practice saying the person’s full name aloud to make sure you are comfortable saying it.
- Have the phone number ready.
- Have an idea of what you want to say.
- Jot down a few questions that might spur conversation, or reveal more about the person you’re calling, or his or her inclination to give.
Making the Call

• Think about the timing of your call (time zones, meal times, and religious holidays).

• Smile!

• Remember the basics: *Is this a good time?* Begin and end with a *thank you*. Remember to make the ask!
The Conversation

• Were you involved in any student organizations or activities while you were at CMU?

• What part of your CMU experience was most meaningful to you/did you enjoy most/did you find most challenging?

• Do you get the magazine, Carnegie Mellon Today/do you get the update email from CMU/do you feel like you’re informed about what’s happening on campus?

  ▪ Source Reference: “Conducting a Better Advancement Interview” by Jim Langley 5/2/12
The Conversation

• How do you feel about CMU today? Is that different than when you were a student? What one thing would you never want CMU to change?

• What do you think is the importance of CMU to the community/state/region? What are the most important purposes it serves? Is it living up to its highest purpose? When has it seemed to be at its best? When has it been challenging?
The Follow Up

• Make note of any mention of new addresses, new phone numbers, etc. Email any updates to acsleaders@andrew.cmu.edu

• Listen for intentions for giving: anticipated giving (and at a particular level) or certainty about not giving should be documented.

• Keep your promises! Integrity is important.
Working with your Gift Officer

Helping to open doors for CMU staff

Cameron Brown H&SS’95
ACS Leader
– Hometown: Jersey City, NJ
Connecting with your Corporation

Developing employer networking opportunities

Lynn Yanyo CIT’81; P:CFA’16

ACS Leader

– Hometown: Cary, NC
Discussion Topics:

What is your greatest fear or challenge?

Can you share an example of a positive contact with a peer?

Everett Tademy
ACS Board Member
– Panel Facilitator
THANK YOU!

Visit: www.cmu.edu/andrewcarnegiesociety

Questions?: acsleaders@andrew.cmu.edu