

Foundation Caller Handbook

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Introduction

Welcome to the University of Wyoming Foundation Call Center!

The Call Center is the hub of relationship building and telephone solicitation at UW. Over 68,000 constituents were attempted in FY08 resulting in revenue in excess of \$250,000. The vast majority of funding received through the Call Center directly impacts every student, either through scholarship support or operating funds.

During the Spring FY08 semester, the Call Center relocated from the College of Engineering and Applied Sciences to the former Forest Service Building at 22nd and Grand Avenues. This location is now referred to as the Foundation Annex and houses Prospect Research, Annual Giving and the Call Center. Revenue from these teams nears \$1 million annually.

You are now a part of that team. As a student caller, you are a representative of the University of Wyoming, the UW Foundation, and all entities associated with these institutions. You and the students that work beside you are ambassadors and marketing touch-points for the alumni and friends you will be speaking to. Your passion and respect for UW will affect every phone call in some way, so represent UW with pride and enthusiasm.

It's a pleasure to have you partner with us as agents of goodwill and solicitors of resources. What you do in the Call Center permanently affects the whole of the University of Wyoming. Enjoy your work and...

Welcome aboard!

The University of Wyoming Foundation Annual Giving Team

The Annual Fund

"Gifts to the Annual Fund are the lifeblood of the university. They make possible a plethora of special uses and projects that would otherwise go unfunded. Donors giving major gifts should always remember to continue their annual fund support. And anyone giving for the first time should understand that this is a critical area. Without the Annual Fund, the university would lose its heartbeat."

- Alan K. Simpson, Class of 1954

The University of Wyoming Annual Fund is the only fundraising program of the university that reaches all alumni, parents, faculty, staff and friends on a yearly basis to offer giving opportunities for direct support of UW's colleges, departments and programs. The UW Annual Fund focuses on acquiring regular, yearly contributions, thus creating a dependable and very important source of non-legislative support for Wyoming's university.

Although the State of Wyoming provides the base of funding UW needs to operate a modern university, it takes the annual support of alumni, parents, faculty, staff and friends to help UW's colleges, departments and programs reach new heights. Because of annual gifts, discretionary funds are available when there is a sudden need or a sudden opportunity.

UW Annual Fund contributions are solicited through face-to-face interaction, mail and telephone appeals, and website interaction. Contributors to the UW Annual Fund may designate their gifts to any area, college, department or program within the university.

The President's Society

The President's Society is the premier leadership giving circle for alumni, parents, faculty, staff and friends of the University of Wyoming and is the flagship of the UW Annual Fund. Individuals, households or businesses donating \$1,000 (\$2,500 in FY10) or more to the University of Wyoming on an annual basis are recognized as members of the President's Society for the remainder of the university's fiscal year, July 1–June 30.

Members of the President's Society enjoy exclusive privileges including special communication concerning major University of Wyoming initiatives, invitations to private University of Wyoming events, recognition as a member of the President's Society, and much more.

About the University of Wyoming Foundation

The UW Foundation, established in 1962, is appointed by the University Board of Trustees to raise, receive, and manage private gifts to maximize support for the University of Wyoming. It is an independent, nonprofit corporation with a Board of Directors comprised of 36 members, including the University president and two members of the UW Board of Trustees. Through private gifts, the University is able to enhance UW programs and projects to meet future needs. The University of Wyoming receives approximately 44 percent of its total budget from state funding. Tuition covers approximately 11 percent of the UW budget.

By raising funds beyond these sources, the Foundation provides the University with monies to take advantage of special opportunities, enhance UW programs, and meet unexpected needs. The funding supplied by private gifts makes the difference between strong UW programs and exceptional ones.

Annual Giving

Regular, yearly contributions in all amounts create a dependable and flexible source of revenue to provide student support, faculty enrichment, equipment, capital improvements, and other immediate needs and opportunities.

Major Giving

Substantial one-time gifts create scholarships, fellowships, professorships, chairs, targeted funding for new or existing academic programs, and support major construction, expansion, or renovation of University buildings. Gift vehicles include cash, stock and securities, real estate, and personal property.

Planned Giving

Planned or deferred gifts, funded through bequests, trusts, annuities, and retirement and insurance plans, allow a donor to leave a UW legacy while realizing financial, tax, and estate-planning benefits.

Matching Gifts

Many companies match employees' charitable giving with a gift of their own. Their gifts are directed to the same college or program as were the employees' original gifts.

Corporate and Foundation Gifts

Support for UW programs and research by local and national businesses, corporations, and foundations often comes in the form of cash, equipment, software, or scholarship/fellowship assistance in a discipline close to the donor's interests.

Honorary and Memorial Gifts

Special UW programs include The Tree and Bench Program for campus beautification and the UW Libraries Memorial Book Program. In addition, facility and scholarship naming opportunities exist campus wide.

Annual Fund Staff Directory

Director of Development, Annual Giving
TBA
10 Foundation Annex
307-766-3933

Development Coordinator, Giving & Telefund
TBA
16 Foundation Annex
307-766-5071

Development Coordinator, Class Giving
Mr. Jesse Kremer
11 Foundation Annex
307-766-3956
jkremer@uwyo.edu

Office Assistant
Ms. Katherine Morgan
11 Foundation Annex
307-766-3979
kemorgan@uwyo.edu

Foundation Staff

Ben Blalock, President
John Stark, Vice President
Mary Ann Garman, CFO/Treasurer
 Nancy Wallace, Financial Services Assistant
 Jeremy Page, Business Manager
 Mamie Knadler, Accountant
 Julie Stephens, Accountant
 Jeanine Thymian, Computer Support Specialist
 Larry May, Trainer
 Bev Roark, Report Development
 Maggie Scott, Report Development
 Audra Weitzel, Gift and Data Processing
 Shirley Kanaly, Gift and Data Processing
 Amy Ernst, Gift and Data Processing
 Deb Hixenbaugh, Gift and Data Processing
Mary Ivanoff, Director of Advancement Services
 Brandi Meyer, Advancement Operations Assistant
 Jessica Mora, Advancement Operations Office Assistant
Chris Spooner, Director of Corporate and Foundation Giving
 Martha Reisch, Corporate and Foundation Giving Associate
 Kevin Snyder, Prospect Research Coordinator
 Sandy Dalles, Prospect Research Associate
 Baillie Townsend Miller, Prospect Research Assistant
Kelly Krueger, Director of National Giving Programs (UWNA)
 Lynnda Simpson, UWNA Event and Board Coordinator

University of Wyoming Academic Development

College of Agriculture

Anne Leonard, Director of Development and College Relations, 307-766-3372

Stephanie Anesi, Deputy Director of Development, 307-766-3078

College of Arts & Sciences

Dale Walker, Director of Development, 307-766-2883

Sid Walter, Associate Director of Development, 307-766-4106

Garrett Danburg, Assistant Director of Development, 307-766-6216

College of Business

Kent Noble, Assistant Dean for Development and External Relations, 307-766-3043

College of Education

Sarah Mathews, Director of Development, 307-760-9647

College of Engineering and Applied Sciences

Sherrie Mellow, Director of Development and Communications, 307-766-2619

College of Health Sciences

Jane Barghothi, Director of Development, 307-766-6751

College of Law

Jill Higham, Director of Development, 307-766-6448

Non-Academic Development

American Heritage Center

Susan Scratchley, Director of Development and Marketing, 307-766-4295

Art Museum

Brenda Bland, Director of Development, 307-766-3497

Cowboy Joe Club

Josh Rebholz, Executive Director & Associate Athletic Director, 307-766-6161

Student Affairs

Janicca Lee, APUW Development Coordinator, 307-766-5123

Libraries

Staci Johnson, Director of Development, 307-766-2430

Outreach

Jeff McDonald, Director of Marketing and Development, 307-766-3152

Helga Otto Haub School and William D. Ruckelshaus Institute of Environmental and Natural Resources

Harold Bergman, Director, 307-766-5150

Student Conduct & Policies

Administrative

Each caller is responsible for reorganizing the station at the end of each shift. If materials need replaced, he or she should notify the supervisor on duty and ensure the station is ready for the next shift.

Each caller is responsible for signing, folding, stuffing and sealing any materials applicable. In the event of a technical disruption, said materials may be available at a later shift. Each caller then will be responsible for any unfinished previous tasks.

Absences/ Attendance/Notification

Callers are required to work a minimum of two shifts a week and a maximum of four a week unless given permission by the Development Coordinator or Director of Annual Giving.

Each caller will agree to an established work schedule at the beginning of each semester. This schedule will serve as that caller's official work schedule for the remainder of the semester. Any revisions are subject to approval by the Development Coordinator or Director of Annual Giving.

Callers are to be at their workstations at the beginning of every shift. Late arrivals will be recorded and reflected in reviews with bearing towards future shifts.

If a shift must be missed, it is the caller's responsibility to find a substitute either via the Call Center phone list or listserv email. Both the primary caller and the substitute must notify the Call Center prior to the session by calling 307-766-5071 and/or email the Development Coordinator/ Acting Supervisor two hours prior to the beginning of the shift.

If a shift cannot be covered, an absence is recorded. All absences must be recorded and the Call Center office notified no later than one hour prior to the call session.

Excused absences include university sponsored activities, medical leave, or bereavement. Each caller is limited to three excused absences per semester. Additional absences can result in termination, at the discretion of the Development Coordinator.

Unexcused absences are defined as absences for any other reason or any excused absence category not verified within one week of the absence. Also, any absence without prior notification will be considered unexcused.

Two unexcused absences in any given semester can result in termination, at the discretion of the Development Coordinator.

Absence Emergency Notification

For each unexcused absence, the Call Center Development Coordinator/Acting Supervisor will follow up with a phone call to provided contact numbers after an hour of tardiness. If no response is received by the close of business, a second call will be made. After 12 hours of no contact, the caller next-of-kin will be contacted.

After 24 hours of no contact, a request will be made to the Dean of Students and University Police and/or City/County law enforcement to perform a safety and wellness check. After notification from these authorities, the caller next-of-kin will be contacted again. These are in accordance with University of Wyoming student and employee guidelines.

Attire & Attitude

Callers are direct representatives of the University of Wyoming, the UWF, the Annual Giving department, and other divisions chosen by the Call Center. Administrators of these entities have the prerogative to visit and observe calling performance as deemed necessary and permitted by the Development Coordinator.

Callers must exhibit a professional demeanor towards call recipients, other co-workers and faculty, staff and administrators.

Confidentiality

Donor/alumni records are displayed for each call attempt. Any biographical, financial, or other pertinent data should be treated with the utmost discretion and not discussed outside the conversation with the constituent or the Development Coordinator/Acting Supervisor.

Discussion of particular donor or alumni details or abuse of data access can result in immediate termination.

Employment restraints

Currently, the UWF budget allocation for work-study applicants does not extend to the Call Center. All callers are employed as non-benefitted part-time at-will staff. Any wages accrued affect eligibility for scholarships or aid solely upon adjusted gross annual income. International employees are limited to a combined maximum of 20 hours per week for all jobs. It is incumbent for the student to notify supervisors regarding other employment and must personally track their own hours to stay within these guidelines. As an at-will employee, termination of employment can occur at anytime at the bequest of the Call Center or the Caller.

Facilities/ perishables

Do not leave any personal items or perishables at the calling stations. A microwave and small refrigerator are provided for minimal preparation or reheating and should be utilized before a call session or during the break. Eating is prohibited while calling. Each caller is responsible to clean each call station at the end of a shift.

Hours of Operation

Call shifts begin promptly at 5:00 pm unless otherwise scheduled. Each four-hour shift is divided with two ten minute paid break. Weekend shifts vary in regularity and length of time.

The Call Center is open throughout the academic semester with exceptions for holidays (federal and institutional) and exam periods unless otherwise deemed necessary by the Annual Giving

Department or the UWF. In cases of inclement weather, an institutional closure or early dismissal will result in Call Center closure.

Salary

All Student Callers will be paid \$8.00 an hour.

Staff ListServ

Each Student Caller is a member of the Call Center ListServ and will periodically receive emails from the administrators or other Student Callers. These messages are crucial to the operation of the UWF Call Center and all inquiries should be responded to as soon as possible. Notifications may include early closure, special opportunities for working additional hours, and shift substitutions. Email phonathon-uw@uwyo.edu to post messages to all members.

Timesheets

Callers will sign in at the beginning of every call shift and sign out at the end. Late entry of time sheets will result in delay of pay (two weeks). Misrepresentation of hours can result in immediate termination and lawful actions through the University of Wyoming Office of Human Resources.

Matching Gifts

Matching gifts are unique opportunities for a donor's gift to be doubled via a corporate/employer donation.

Employer Matching

Thousands of corporations and companies support non-profit institutions and education foundations (like the University of Wyoming and the UWF) through direct gifts and match gifts. Criteria for matching gifts vary with each entity and fiscal year. Gift ratios and availability are determined by the corporation, not the University of Wyoming.

Process for Matching

A donor interested in having a gift matched by an employer should contact his/her Human Resources Department and inquire as to the availability and/or stipulations for a match gift. If the employer is a participating match company, the employee will fill out the requisite paperwork and follow the company guidelines. The UWF Gift Processing Office will receive this information and process the gift and paperwork for the match. Dependent upon the match employer guidelines and the employee's timeliness, match gifts may require 30 days to six months or longer to process.

Planned Giving

Planned or deferred gifts, funded through bequests, trusts, annuities, and retirement and insurance plans, allow a donor to leave a UW legacy while realizing financial, tax, and estate-planning benefits.

Bequests

A bequest – or simply, a willed portion of assets – ensures that a person's support of the University of Wyoming continues after death. An individual can establish a stipulation in his/her will to distribute – in part or whole – any asset to a designation of choice.

Trusts

A trust – charitable remainder uni-trust – is a legal entity that manages an individual's estate and/or finances. The trust produces a set amount – based on interest of the assets – which serves as income to the donor. The UWF is established as the trust's manager and is the recipient of the remainder of the assets upon the donor's passing.

Annuities

An annuity is a charitable gift that establishes a charitable organization as a fund manager to redistribute tax-deferred interest to the donor over time. A portion of the original gift is accepted as a straight gift and the remainder invested. Both the donor and recipient benefit from a gift that would otherwise be taxed at a much higher level.

Insurance/Retirement

Donation of proceeds – in part or whole – from a retirement agreement or life insurance policy alleviates significant income taxation upon survivors after death. Instead the UWF receives these funds as a charitable gift designee as assigned by the policy holder and is exempt from full-taxation due to the non-profit status.

The National Do Not Call Registry

If the federal law supporting the National Do Not Call Registry is upheld, millions of Americans will continue receiving fewer unwanted telemarketing calls. The new registry limits most sales calls to numbers on the list. However, calls from political organizations, telephone surveyors, and charitable organizations – including the University of Wyoming – are exempt from the law.

At UW, we are sensitive to the intrusion represented by certain telemarketing practices; at the same time, telephone campaigns provide the rare opportunity for us to reach out and speak to alumni and friends. The thousands of dollars annually raised by “telefunding” allow us to continue and expand important programs at UW.

For instance, the UW Annual Fund phonathon raises some \$350,000 each year in supplemental operating support and discretionary funds for administrators of colleges, departments, and programs at the university. Phonathon callers clearly identify themselves as UW students, not paid professional telemarketers. They often talk to UW’s alumni and friends about what has been happening on campus, in addition to updating alumni records and asking for support.

For more information regarding the National Do Not Call Registry, visit www.donotcall.gov or call (888) 382-1222.

Preliminary Fiscal Year 2008-2009 Phone Appeal Calendar

A09PA	President's Society Renewal: FY08 \$1000+
A09PB	President's Society Reacquisition: Former PS member (FY03-07) but not in FY08
A09PC	Non-PS Renewal (\$500+): All FY08 donors with fiscal year total between \$500 and \$999.99
A09PD	Non-PS Renewal (\$125+): All FY08 donors with fiscal year total between \$125 and \$499.99
A09PE	Non-PS Renewal (\$1+): All FY08 donors with fiscal year total between \$1 and \$124.99
A09PF	Lapsed Donor: Any (FY03-07) donor who did not give in FY08, not in a preceding segment
Manual	See Below

- *Tentative calling September through December only*

Week of	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Aug 17		Job Posting					
Aug 24		Load Data	Interviews	Interviews	Interviews	Interviews	
Aug 31		Labor Day	Interviews	Training/2	Training/2	Training/2	
Sept 7		A09PA/4	A09PA/4	A09PA/4	A09PA/4	Steward/4	
Sept 14		A09PA/4	A09PA/4	A09PA/4		A09PA/4	A09PA/4
Sept 21		A09PA&B/4	A09PB/4	A09PB/4	A09PB/4		
Sept 28	A09PB/3		A09PB/4	A09PB/4		A09PB/4	A09PB/4
Oct 5		A09PB/4	A09PB/4	A09PC/4	A09PC/4	Steward/4	
Oct 12		A09PC/4	A09PC/4	A09PC/4	Mid-term		
Oct 19	A09PC&D/3		A09PD/4	A09PD/4		A09PD/4	A09PD/4
Oct 26		A09PD/4	A09PD/4	A09PD/4	A09PD/4		
Nov 2		A09PE/4	A09PE/4	A09PE/4	A09PE/4	Steward/4	
Nov 9	A09PE/3		A09PE/4	A09PE/4		A09PE/4	A09PE/4
Nov 16		A09PE/4	A09PE/4	A09PE&F/4	A09PE&F/4		
Nov 23		A09PF/4	A09PF/4	Thanksgiving Break			
Nov 30		A09PF/4	A09PF/4	A09PF/4	A09PF/4	Steward/4	A09PF/3
Dec 6		A09PF/3	A09PF/3	A09PF/3	A09PF/3		
Dec 13		Steward/3	Steward/3	Steward/3	Steward/3		

Additional Manual Calling

September 12: Morning Thank You Calls

October 10: Morning Thank You Calls

November 7: Morning Thank You Calls

December 4: Morning Thank You Calls

December 14-17: Year-End President's Society Appeal & Major Pledge Follow-up

TBA: Pledge Follow-up

TBA: Will-Consider Follow-up

Fiscal Year 2008-2009 Mail Appeal Calendar

The Annual Giving Team produces quarterly strategic inclusive mail appeals. These can account for over 150,000 pieces of mail a year. Aside from these four general central appeals, specialized targeted appeals including Class Reunion and President's Society mailers provide the bulk of revenue.

Quarterly Central Appeals: September 1, November 15, February 15, May 1

Class Giving: August – November

President's Society: August 15, November 15, December 15, February 15, April 15, June 1

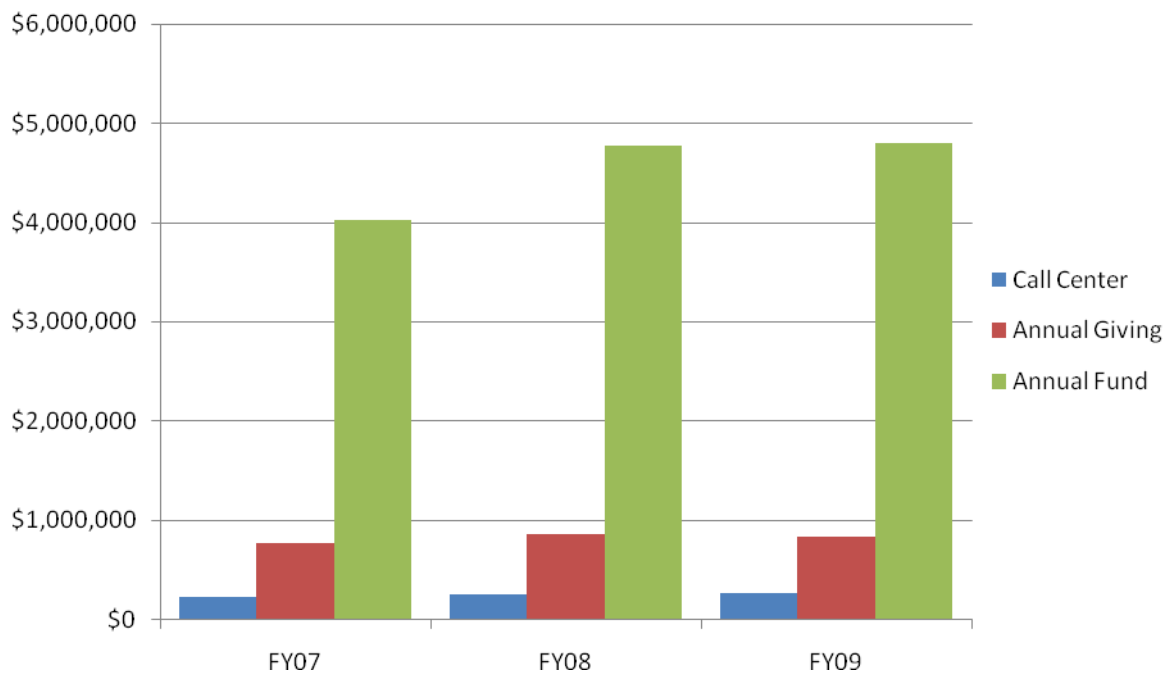
Others: As deemed necessary

Fiscal Year 2008-2009 Goals

Call Center: \$275,000
5,000 Pledges
1,000 Captured Email Addresses

Annual Giving Team: \$840,000

University Annual Fund: \$4,800,000



A09PA: President's Society Renewal: \$1000+

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, I want to personally thank you for your generous support to UW in our 2007-2008 academic year. Your gift has really made a difference and as a student, I can say it was a very worthwhile investment.

ASK: As a President's Society member, you are probably aware we just started a new year and that we count on your support to continue towards excellence. Are you willing to participate in our Annual Fund drive tonight with a donation to (PREVIOUS ALLOCATION)?

YES: Would you like to increase your gift from last year?

YES: Great! How much would you like to give?

NO: I completely understand. How much would you like to give tonight?

WILL-CONSIDER: In the next few days we will send out a letter outlining various ways you can contribute. When you decide where you'd like to give, mark it on the reply device and mail it and your gift in.

NO: (LISTEN TO DONOR) Is there another way you would like to assist the University?

GIFT VERIFICATION (DONORS ONLY): To double-check, you would like to give (\$____) to (ALLOCATION FUND), is that correct? If it is more convenient, I can take your credit card information this evening...

LATER/BILL ME: We can definitely do that. You will receive a letter in a few days with a reply device.

DEMOGRAPHIC VERIFICATION: Before you go, can I ask a few more questions? Are you still living at _____? Is there an email address/change that we can mark in your records? Etc...

FINALE: Thank you again for your time, (Salutation). *By the way, since you live in the * _____ area you may be interested in knowing of UW activities and gatherings occasionally. Would you like me to give the UW National Ambassadors your email address for notification of future UW events in * _____? (If they ask about UWNA, simply refer them to our website at www.uwyo.edu/ambassadors).*

DONOR: And thank you for your generosity to (FUND ALLOCATION) and your willingness to support UW. Have a wonderful evening.

WILL-CONSIDER: And thank you for thinking about how you can partner with UW to promote excellence and success. Have a wonderful evening.

NON-DONOR: And I hope you consider UW in your plans for next year.

* Seattle, San Francisco Bay Area, San Diego, Salt Lake City, Phoenix, Tucson, along the Front Range of Colorado, Houston, San Antonio, Chicago, Milwaukee, Madison WI, Washington D.C., New York City and commuter cities

A09PB: President's Society Reacquisition: \$1000 + FY03-07

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, I want to personally thank you for your past generous support to UW. You giving really made a difference and as a student, I can say it was a very worthwhile investment.

ASK: As a previous President's Society member, you aware we just started a new year and that we count on your support to continue towards excellence. The cost of education increases each day and UW is no different. Because of this, we depend upon our President's Society members to lead the way in giving and making quality college education possible. Will you consider renewing your giving from (YEAR) to continue your membership in the President's Society?

YES: Great! How much would you like to give?

NOT AT LEVEL: I completely understand. Would you be willing to participate in our Annual Fund drive with a continued donation to (PREVIOUS ALLOCATION)?

WILL-CONSIDER: In the next few days we will send out a letter outlining various ways you can contribute. When you decide where you'd like to give and at what level, mark it on the reply device and mail it and your gift in.

NO: (LISTEN TO DONOR) Is there another way you would like to assist the University?

GIFT VERIFICATION (DONORS ONLY): To double-check, you would like to give (\$____) to (ALLOCATION FUND), is that correct? If it is more convenient, I can take your credit card information this evening...

LATER/BILL ME: I can do that. You will receive a letter in a few days with a reply device.

DEMOGRAPHIC VERIFICATION: Before you go, can I ask a few more questions? Are you still living at _____? Is there an email address/change that we can mark in your records? Etc...

FINALE: Thank you again for your time, (Salutation). *By the way, since you live in the ____*____ area you may be interested in knowing of UW activities and gatherings occasionally. Would you like me to give the UW National Ambassadors your email address for notification of future UW events in ____*____? (If they ask about UWNA, simply refer them to our website at www.uwyo.edu/ambassadors).*

DONOR: We appreciate your generosity to (FUND ALLOCATION) and your willingness to support UW. "Welcome Back" to the President's Society and have a wonderful evening.

WILL-CONSIDER: And thank you for thinking about how you can partner with UW to promote excellence and success. Have a wonderful evening.

NON-DONOR: And I hope you consider UW in your plans for next year.

* Seattle, San Francisco Bay Area, San Diego, Salt Lake City, Phoenix, Tucson, along the Front Range of Colorado, Houston, San Antonio, Chicago, Milwaukee, Madison WI, Washington D.C., New York City and commuter cities

A09PC: Donor Renewal (High)

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, I want to personally thank you for your generous support to UW in our 2007-2008 academic year. Your gift has really made a difference and as a student, I can say it was a very worthwhile investment.

ASK: As a previous donor, you are probably aware we just started a new year and that we count on your support to continue towards excellence. The cost of education continues to rise with each semester. Will you consider increasing your giving from last year to **\$1000** or more?

YES: Great! How much would you like to give?

NOT AT LEVEL: I completely understand. Would you be willing to participate in our Annual Fund drive tonight by continuing your donation to (PREVIOUS ALLOCATION) at (LAST GIVING LEVEL)?

NO: Is there a level you feel comfortable with?

WILL-CONSIDER: In the next few days we will send out a letter outlining various ways you can contribute. When you decide where you'd like to give and at what level, mark it on the reply device and mail it and your gift in.

NO: (LISTEN TO DONOR) Is there another way you would like to assist the University?

GIFT VERIFICATION (DONORS ONLY): To double-check, you would like to give (\$____) to (ALLOCATION FUND), is that correct? If it is more convenient, I can take your credit card information this evening...

LATER/BILL ME: I can do that. You will receive a letter in a few days with a reply device.

DEMOGRAPHIC VERIFICATION: Before you go, can I ask a few more questions? Are you still living at _____? Is there an email address/change that we can mark in your records? Etc...

FINALE: Thank you again for your time, (Salutation). *By the way, since you live in the _____ area you may be interested in knowing of UW activities and gatherings occasionally. Would you like me to give the UW National Ambassadors your email address for notification of future UW events in _____? (If they ask about UWNA, simply refer them to our website at www.uwyo.edu/ambassadors).*

DONOR: We appreciate your generosity to (FUND ALLOCATION) and your willingness to support UW. Have a wonderful evening.

WILL-CONSIDER: And thank you for thinking about how you can partner with UW to promote excellence and success. Have a wonderful evening.

NON-DONOR: And I hope you consider UW in your plans for next year.

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A09PD: Donor Renewal (Mid)

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, I want to personally thank you for your generous support to UW in our 2007-2008 academic year. Your gift has really made a difference and as a student, I can say it was a very worthwhile investment.

ASK: As a previous donor, you are probably aware we just started a new year and that we count on your support to continue towards excellence. The cost of education continues to rise with each semester. Will you consider increasing your giving from last year to **\$500** or more?

YES: Great! How much would you like to give?

NOT AT LEVEL: I completely understand. Would you be willing to participate in our Annual Fund drive tonight by continuing your donation to (PREVIOUS ALLOCATION) at (LAST GIVING LEVEL)?

NO: Is there a level you feel comfortable with?

WILL-CONSIDER: In the next few days we will send out a letter outlining various ways you can contribute. When you decide where you'd like to give and at what level, mark it on the reply device and mail it and your gift in.

NO: (LISTEN TO DONOR) Is there another way you would like to assist the University?

GIFT VERIFICATION (DONORS ONLY): To double-check, you would like to give (\$____) to (ALLOCATION FUND), is that correct? If it is more convenient, I can take your credit card information this evening...

LATER/BILL ME: I do that. You will receive a letter in a few days with a reply device.

DEMOGRAPHIC VERIFICATION: Before you go, can I ask a few more questions? Are you still living at _____? Is there an email address/change that we can mark in your records? Etc...

FINALE: Thank you again for your time, (Salutation). *By the way, since you live in the _____ area you may be interested in knowing of UW activities and gatherings occasionally. Would you like me to give the UW National Ambassadors your email address for notification of future UW events in _____? (If they ask about UWNA, simply refer them to our website at www.uwyo.edu/ambassadors).*

DONOR: We appreciate your generosity to (FUND ALLOCATION) and your willingness to support UW. Have a wonderful evening.

WILL-CONSIDER: And thank you for thinking about how you can partner with UW to promote excellence and success. Have a wonderful evening.

NON-DONOR: And I hope you consider UW in your plans for next year.

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A09PE: Donor Renewal (Base)

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, I want to personally thank you for your support to UW in our 2007-2008 academic year. Your gift has really made a difference and as a student, I can say it was a very worthwhile investment.

ASK: As a previous donor, you are probably aware we just started a new year and that we count on your support to continue towards excellence. The cost of education continues to rise with each semester. Will you consider increasing your giving from last year to **\$125** or more?

YES: Great! How much would you like to give?

NOT AT LEVEL: I completely understand. Would you be willing to participate in our Annual Fund drive tonight by continuing your donation to (PREVIOUS ALLOCATION) at (LAST GIVING LEVEL)?

NO: Is there a level you feel comfortable with?

WILL-CONSIDER: In the next few days we will send out a letter outlining various ways you can contribute. When you decide where you'd like to give and at what level, mark it on the reply device and mail it and your gift in.

NO: (LISTEN TO DONOR) Is there another way you would like to assist the University?

GIFT VERIFICATION (DONORS ONLY): To double-check, you would like to give (\$____) to (ALLOCATION FUND), is that correct? If it is more convenient, I can take your credit card information this evening...

LATER/BILL ME: I can do that. You will receive a letter in a few days with a reply device.

DEMOGRAPHIC VERIFICATION: Before you go, can I ask a few more questions? Are you still living at _____? Is there an email address/change that we can mark in your records? Etc...

FINALE: Thank you again for your time, (Salutation). *By the way, since you live in the _____ area you may be interested in knowing of UW activities and gatherings occasionally. Would you like me to give the UW National Ambassadors your email address for notification of future UW events in _____? (If they ask about UWNA, simply refer them to our website at www.uwyo.edu/ambassadors).*

DONOR: We appreciate your generosity to (FUND ALLOCATION) and your willingness to support UW. Have a wonderful evening.

WILL-CONSIDER: And thank you for thinking about how you can partner with UW to promote excellence and success. Have a wonderful evening.

NON-DONOR: And I hope you consider UW in your plans for next year.

* Seattle, San Francisco Bay Area, San Diego, Salt Lake City, Phoenix, Tucson, along the Front Range of Colorado, Houston, San Antonio, Chicago, Milwaukee, Madison WI, Washington D.C., New York City and commuter cities

A09PF: Donor Reacquisition (Non-President's Society)

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, I want to personally thank you for your previous support to UW. Your giving really made a difference and as a student, I can say it was a very worthwhile investment.

ASK: As a previous donor, you are probably aware we just started a new year and that we count on your support to continue towards excellence. The cost of education continues to rise with each semester. Since it has been some time since your last contribution, will you consider a new gift of **\$125** or more?

YES: Great! How much would you like to give?

NOT AT LEVEL: I completely understand. Would you be willing to participate in our Annual Fund drive tonight by continuing your donation to (PREVIOUS ALLOCATION)?

NO: Is there a level you feel comfortable with?

WILL-CONSIDER: In the next few days we will send out a letter outlining various ways you can contribute. When you decide where you'd like to give and at what level, mark it on the reply device and mail it and your gift in.

NO: (LISTEN TO DONOR) Is there another way you would like to assist the University?

GIFT VERIFICATION (DONORS ONLY): To double-check, you would like to give (\$____) to (ALLOCATION FUND), is that correct? If it is more convenient, I can take your credit card information this evening...

LATER/BILL ME: We can definitely do that. You will receive a letter in a few days with a reply device.

DEMOGRAPHIC VERIFICATION: Before you go, can I ask a few more questions? Are you still living at _____? Is there an email address/change that we can mark in your records? Etc...

FINALE: Thank you again for your time, (Salutation). *By the way, since you live in the _____* area you may be interested in knowing of UW activities and gatherings occasionally. Would you like me to give the UW National Ambassadors your email address for notification of future UW events in _____*? (If they ask about UWNA, simply refer them to our website at www.uwyo.edu/ambassadors).*

DONOR: We appreciate your generosity to (FUND ALLOCATION) and your renewed willingness to support UW. Have a wonderful evening.

WILL-CONSIDER: And thank you for thinking about how you can partner with UW to promote excellence and success. Have a wonderful evening.

NON-DONOR: And I hope you consider UW in your plans for next year.

* Seattle, San Francisco Bay Area, San Diego, Salt Lake City, Phoenix, Tucson, along the Front Range of Colorado, Houston, San Antonio, Chicago, Milwaukee, Madison WI, Washington D.C., New York City and commuter cities

Manual Thankathon

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: My name is _____ and I am a (CLASS) at the University of Wyoming.

THANK: I am calling to personally thank you for your gift to (ALLOCATIONS). Donations to any aspect of the Annual Fund increase the health to the whole University. As a student, I benefit from your generosity every time I participate in a class room discussion, study in the library or simply walk across Prexy's Pasture. Thank you again for your contribution and I hope you have a great day!

President's Society Year End Appeal

GREET: Good evening/afternoon. May I speak with _____? Hi, (Salutation), how are you doing?

IDENTIFY: This is _____ calling on behalf of the Annual Fund at the University of Wyoming.

THANK: First, thank you for being a past President's Society member. Your generosity very much appreciated by every student and employee at UW.

ASK: Since you have already received information regarding the Annual Fund and leadership level giving, we wanted to remind you that the end of the tax year is approaching. While any gift made before June 30th 2009 will go towards your President's Society membership, I encourage you to postmark any anticipated gifts before December 31st 2008 for this year's IRS statement. If you would like to make a gift today, I can certainly take your credit card information over the phone.

FINALE: Thank you again for your time, (Salutation).

DONOR: And thank you for your generosity to (FUND ALLOCATION) and your willingness to support UW. Have a wonderful evening.

WILL-CONSIDER: And thank you for considering a year-end gift to UW. Have a wonderful evening.

Special Responses

Deceased

“Mr./Mrs. X has passed away...”

Whether yesterday or a number of years ago, the loss of a loved one is traumatic. Apologize for the call, express condolences, and – unless the individual on the other end of the conversation signals that continued communication is allowable – end the call as courteously and quickly as possible.

Do Not Call/Solicit

“I am on the Do Not Call list...”

As a public university, the University of Wyoming is not bound by the same governances as other not-for-profit organizations or businesses. However, these requests will be honored

Alumni Association

“I already made a pledge to the Alumni Association...”

The Alumni Association facilitates specific fundraising initiatives throughout the year to sustain its own activities and minimal scholarships. The efforts of the UWF Annual Giving operation support all academic units and specific non-academic units through discretionary and unrestricted funds.

Recent Donor

“I just sent in a gift...”

Thank the individual for their generosity and express the worth gift have to the campus. Apologize for the intrusion and thank again before concluding the call.

Gift/Pledge Issues

Questions will arise regarding previous gifts or pledges or how a particular fund is used. For the vast majority of questions, the RuffaloCODY call screen will answer a question. If there is a discrepancy or more advanced question, refer the individual to the UWF toll free line or capture the information, forward it to a call supervisor and a member of the Foundation staff will contact the individual. DO NOT ATTEMPT TO CREATE AN ANSWER.

The Fundraiser's Vocabulary

#9 Envelop (BRE/Business Reply Envelope): An envelope response device by which a donor returns a gift

#10 Envelope (Carrier): An envelope used to for sending materials to the donor

Appeal: Any method of communication that asks – or “appeals” to – a prospect for contribution. This is often mail, phone or “face-time”

Campaign: A determined length of time in which gifts are sought for a specific purpose.

Annual Fund: Recurring campaign for discretionary/unrestricted gifts. Based upon Fiscal Year and set goals.

Capital Campaign: Can be specifically for a singular item (building, scholarship initiatives, new programs, etc) and are often limited from 1-5 years.

Calendar Year (CY): The standard year by which most donors determine gift patterns. January 1st – December 31st also corresponds to the Internal Revenue Service tax season.

Fiscal Year (FY): The academic/operational calendar. Often corresponds to the beginning of a quarter (January 1, April 1, July 1, September 1). UW's Fiscal Year runs from July 1st through June 30th. Fiscal Years can be referred to by the last year of the Fiscal Year (ex. July 1, 2008 – June 30, 2009 = FY 2009) or as combined years (ex. July 1, 2008 – June 30, 2009 = FY 0809).

Calendar Year End (CYE): Appeals that encourage gifts before the end of the Calendar Year and the end of the Internal Revenue Service tax season. Gift appeals should be completed by December 1st and pledge follow-ups by December 15th to allow mail and gift processing. Any gift postmarked by December 31st will be counted for tax purposes.

Fiscal Year End: Appeals that encourage gifts before the end of the Fiscal Year. Gift appeals should be completed by May 15th and pledge follow-ups by June 15th to allow mail and gift processing. Any gift postmarked by June 30th will be counted for internal auditing and campaign purposes.

LYBNT or “Last Year But Not This (Year)”: Classification for a donor's last gift as the previous fiscal year but not in the current fiscal year

SYBNT or “Some Year But Not This (Year)” : Classification for a donor's last gift in a previous year but not the current fiscal year or two years prior

TYBNT or “Two Year(s) ago But Not This (Year)” : Classification for a donor's last gift in the fiscal year two years prior