10/17/2011

Saint John's
UNIVERSITY

ANNUAL FUND

Fellows Volunteer Handbook

Fiscal Year 2012

July 1, 2011 to June 30, 2012

Thank you!

Thank you for volunteering to serve on your class committee. Saint John's is grateful for your gift of time and effort. Whether you are a Fellows Chair or Fellows Volunteer, your involvement will ensure a strong showing from your class in this year's Johnnie events and the undergraduate Annual Fund.

This handbook presents an overview of the class committees and your role as a volunteer. We encourage you to visit **www.sjualum.com** and click Volunteer for access to your volunteer assignments, your class page, and other helpful class and fundraising information.

To help you get the most from this experience, the Annual Giving team is available to support you and your class committee's efforts. Please let us know if there is anything we can do to help you.

Thank you!

Annual Giving Contacts and Resources

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Saint John's University Mission

Saint John's University fosters the vitality of community through learning and the pursuit of wisdom. Striving for excellence, we unite the wisdom of Catholic social teaching and intellectual tradition with the practicality of the common life envisioned by Saint Benedict.

Saint John's University seeks to be one of the nation's great Catholic liberal arts colleges by providing the best holistic learning experience for men in the country.

We will inspire undergraduate men to new heights of intellectual, spiritual, physical and social development that is informed by ethical reflection and grounded in our Catholic and Benedictine tradition.

About the Fellows Society

In 1971, sixty-four people dedicated to educational mission of Saint John's University each stepped forward with a significant annual gift and thus the Fellows Society was born.

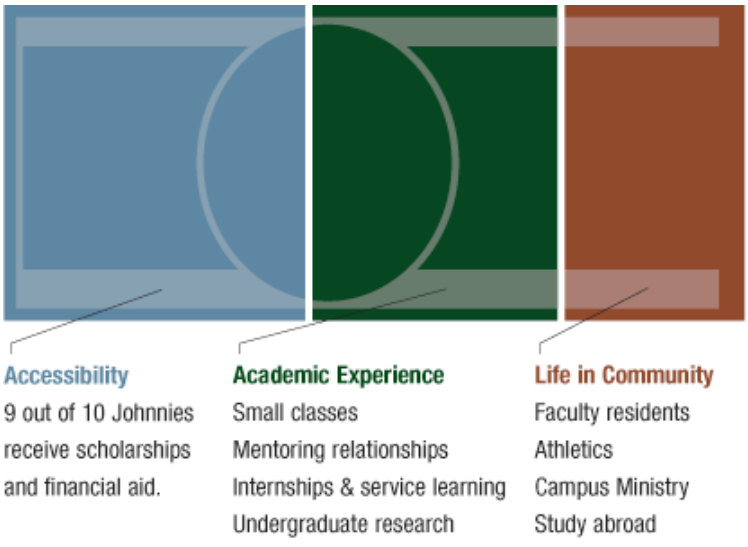
The Fellows Society is a distinguished group of alumni, parents, and friends who, year after year, set the pace for the Saint John's University Annual Fund by making a leadership gift of $1,000 or more.

The Fellows Society has an extraordinary impact on Saint John's; in the 2010-2011 fiscal year, 6,881 alumni, parents and friends contributed $2,892,000 to the Annual Fund to help current students. Members of the Fellow Society contributed over 71% of that amount, yet this came from 821 donors. To reach our Annual Fund goals and keep pace with student scholarship needs in the coming years we will need to continually grow the number of Fellow Society members.

We invite you, as a Fellows Volunteer, to provide the leadership that will take the Annual Fund to new successes by engaging and encouraging classmates and friends to become members of the Fellows Society.

Fellows Volunteers and Class Committees

Saint John's maintains a very strong tradition of alumni participation in events, reunions, community engagement and giving. Class Committees sustain community beyond Collegeville and provide the backbone of the famed "Johnnie network." Fellows Volunteers are central to successful classes.



Class Committees aim to promote class-specific social events, particularly class reunions, update classmate biographical

information and inspire greater levels of class participation in the Annual Fund. Year to year, Class Committees organize fundraising campaigns for the Annual Fund. Every five years, these volunteers run significant campaigns designed to celebrate reunion milestones.

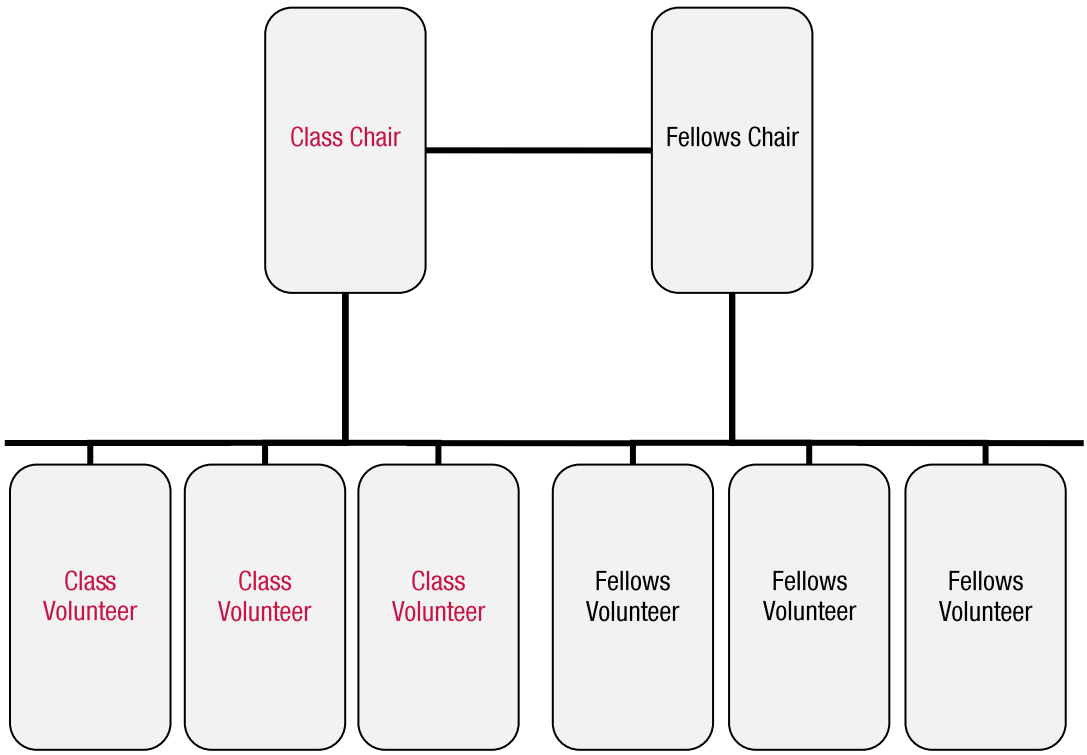
Class Committee giving campaigns help honor your classmates and their contributions. It is much more meaningful to be approached personally for a gift, and Saint John's relies on volunteers to help us reach every classmate on an individual level.

Finally, class participation in the annual fund is a strong indicator of alumni satisfaction. Your class gift says to current Johnnies, external funders and prospective students that alumni value Saint John's and believe in its mission.

Class Committee Structure

The Fellows Chair serves as one of two overall leaders of his class for all official Saint John's functions. He is a main point of contact for Saint John's staff, raises funds, and serves a term of at least three years. Each class also has a Class Chair with the same duties, but who works with non-Fellows donors and prospects.

Each class has 10-15 Fellows Volunteers who serve as ambassadors to the Fellows donors and prospects in the class. They reach a wide variety of social circles, plan large- and small-group class events, raise funds, and serve a term of at least three years. Each class also has Class Volunteers with the same duties, but who work with non-Fellows donors and prospects.



Fellows Volunteer Job Description

- Lead by example. Show yearly support for the Annual Fund Fellows Society ($1,000 or more)
- Complete a Class Committee training session with an Annual Giving staff member.
- Maintain open lines of communication with Saint John's, committee members and classmates.
- Read and sign the Volunteer Confidentiality Agreement.
- Attend the weekend Spring Volunteer Summit at Saint John's University.
- Attend all Class Committee meetings or conference calls.
- Select five to 10 classmates, friends, or other people who have the capacity to join the Fellows Society, and
    a. Invite your classmates to attend alumni events (listed at **www.sjualum.com/events**), class events, Homecoming, and your Reunion.
    b. Engage and encourage them to join you as a new Fellows Society member with a $1,000 gift to Saint John's Annual Fund.
        i. After your prospects have been approved by the Annual Giving team at SJU, make contact with them.
        ii. Make sure their contact information is correct.
        iii. Discuss with them key information about Saint John's (i.e. How to get more involved, **www.sjualum.com**, and the magazine)
        iv. Ask them to join you in your Annual Fund support.
        v. Any time you have had significant contact with a prospect, fill out and send back your Contact Report to the Annual Giving team.
- Continue to engage your five to 10 prospects and monitor their giving via information provided by SJU.
    a. Send them stories, links, and information about Saint John's that you think will interest them.
    b. Invite them to join you on other SJU volunteer projects with which you are involved.
- Review the quarterly statements from Saint John's, and call, visit, and/or write your prospects to thank them when they make their gifts.
- Respond to follow-up inquiries about contact reports and requests for information from the Annual Giving team and Fellows Chair.
- Act as eyes and ears for Saint John's by relaying questions and concerns of alumni to the Annual Giving team.

Fellows Chair Expectations

Time Commitment

- Two to four hours per month working on events and fund raising
- Two to three classmate calls per month
- Set conference call schedule with Class Chair and IA Staff
- Participate in the Alumni Summit

Goals

- Recruit 10 to15 classmates that will serve annually as Fellows Volunteers.
  - Reach out to classmates who currently give are well connected and ask them to be Fellows Volunteers.
  - Continue to identify new classmates that could serve as Fellows Volunteers and help in their recruitment.
- Work with your Class Chair to:
  - Co-chair a Class Committee consisting of Class Volunteers and Fellows Volunteers
  - Plan one to two class events each year
  - Update classmate contact information with each contact
  - Set and achieve yearly fund raising goals through letters, e-mail and personal solicitation
- Attend Quarterly Conference calls with all Class and Fellows Chairs (10 a.m. Central Time)
  - Wednesday, November 16, 2011
  - Wednesday, February 15, 2012
  - Wednesday, May 16, 2012

Making the Case for Annual Fund Support

The Saint John's Annual Fund allows us to continue the great tradition of investing in young men and enabling every Johnnie to participate in the full range of the Saint John's experience—now. The Annual Fund is the third largest source of funds for the university and is raised by alumni, parents and friends. It supports the academics, the community life and the scholarships that make a Saint John's education so powerful. The Annual Fund supports the backbone of the Johnnie experience that fosters community, is rooted in Benedictine values, and develops men into active community members and leaders.

Prospect: Okay, well what actually *is* the Annual Fund?

Volunteer: The Annual Fund keeps Saint John's going year-to-year.

- After tuition and the endowment, it's the third largest source of funds for the university.
- It comes from people like us – alumni, parents and friends who believe in the mission of Saint John's.
- Our annual gifts are used right away to support the academics, community life and scholarships at SJU.
- My Saint John's education was powerful and memorable, and we can continue that long tradition for others.
- The Annual Fund sustains the backbone of the Johnnie experience of community and Benedictine values, and leads to what we all want: more great Johnnies in the world.

If you are able to articulate why you personally give to Saint John's, that reason will be your most compelling case to encourage others to support the Annual Fund. Some people give to Saint John's to express their affection, loyalty or warm memories of Saint John's. Others give to make sure the Saint John's education they received is available to others. Perhaps you give because you want Saint John's to continue sharing the Benedictine values with the world.

Don't be afraid to be personal, and to ask your classmate how Saint John's has affected his life. Encourage him to share his memories. While you should be familiar with the institutional case for support, it is much more important that the conversation be tailored to the individual's interests and reasons for giving.

Making the Ask

There really is no one right way to make an ask. The way that works for you will vary depending on your comfort level with solicitation and your existing relationship with each prospect. Our advice is to be honest and direct. Let your prospect know why you are calling on them early in your contact. Tell them that you are calling on behalf of your Saint John's class committee and you would like to talk to them about the Annual Fund Campaign, but also that you hope you will be able to help them to reconnect to SJU and your class. Here are some tips for asking.

Institutional Case for Support

Your classmate's Annual Fund gift will make the Johnnie experience possible for current students.

- Ensure a high-quality academic experience
  - Small class sizes
  - Mentoring relationships
  - Cutting edge technology
  - Undergraduate research
- Grow real life experience for Johnnies
  - Internships
  - Study Abroad
  - Service and experiential learning
- Continue a community like no other
  - Residential life anchored in mutual respect and hospitality
  - Benedictine values throughout the experience
  - Faculty residents and campus ministry
  - Athletics
- Help make Saint John's accessible
  - 90 percent of Johnnies receive scholarships or financial aid from your Annual Fund contributions and our alumni endowments.

Personal Calling Campaign

After training, SJU staff will help you to select 10 to 15 people from among friends, classmates, or whomever you think you can inspire to join you as a donor to Saint John's. These prospects can be anybody who you have stayed in touch with since college or would like to reconnect with. Some friends and classmates may already be selected by another volunteer or development staff person at Saint John's. You are still welcome to call them, but please coordinate your efforts so only one person asks them for a gift.

After selecting our prospects, you will receive a Personal Contact Call Sheet for each person. We have found that volunteers have seen success by sending an introductory e-mail explaining their reason for contacting prospects and to expect a follow-up call or visit soon. A sample personal e-mail is available at www.sjualum.com.

When you make contact with them, you should make sure their biographical information is up-to-date. After each significant contact with a prospect (whether you ask for a gift or not), you should fill out a contact report and return it to Saint John's. While the best time and way to ask for a gift varies from person to person, Saint John's does suggest that you be up-front with prospects about the nature of the visit or call. There is an indicator on the Call Sheet for the prospect's preferred quarter to give.

After making the initial ask, you should continue to engage your prospects and monitor their giving to make sure they follow through with the pledge they made to you. You should also personally thank all of your prospects, whether they do or do not give. Saint John's provides cards for handwritten thank-you notes.

Class Committee Tools

From your Class Chair and Fellows Chair

- Assistance with personal calling campaign
- Host a quarterly conference call or meeting for volunteers
- Authoring letters on behalf of the class committee

From Saint John's Staff

- Fellows Volunteer Handbook
- A list of classmates from which to select your 10-15 assigned prospects
- An electronic prospect information sheet for each assigned contact
- An automatic e-mail each time one of your prospects gives to any fund at Saint John's

Quarterly Reports

Every quarter, you will receive an e-mail with an Excel spreadsheet that will include:

- Updated contact information received for each prospect
- A brief status update on each prospect's giving history
- An indicator of each prospect's preferred quarter for giving, based on the last gift date
- Your class giving total made to the Annual Fund vs. the previous fiscal year
- Your class attendance at two or more Saint John's events

Online

Use **www.sjualum.com** for easy access to:

- Personal Contact Selection pages
- Contact Report form www.sjualum.com/contactreport
- Class Engagement Stats: Compare your class with others
- Class Event Planning Guide
- List of alumni-friendly bars and restaurants for class events
- Volunteer supply request form
- Sample personal e-mails

The Annual Fund Calendar

	Date	Class and Fellows Volunteer Activities
Q1	July 1 – Oct. 1	Fiscal Year begins (Volunteers contact and solicit key prospects)
	Aug. 11, 17	Conference calls for Class Chairs (11th) and Fellows Chairs (17th)
	Sept. 1	Homecoming letter from Class Committees
	Sept. 28-30	**Homecoming Weekend** Reunion classes celebrate previous year's results.
Q2	Oct. 15 – Dec. 15	Volunteers personally contact all prospects and SJU begins mailing solicitations
	Nov. 16	Quarterly conference call for Class and Fellows Chairs
	Nov. 9	Q2 Annual Fund letter from Class Committees
Q3	January – March	Volunteers continue to contact and thank prospects
	Feb. 15	Quarterly conference call for Class and Fellows Chairs
	March 15	Honor Roll letter from Class Committees
Q4	April or May	**Alumni Volunteer Summit**
	May 16	Quarterly conference call for Class and Fellows Chairs
	May 31	All assigned classmates have been contacted
	June 30	Fiscal Year ends

Tips for Asking about Giving

- Many companies will double or even triple their employees' charitable contributions by making a matching gift to Saint John's. However, matching companies can only match a gift when the employee fills out the appropriate paperwork (usually available in the company's Human Resources office). It is often a good idea to remind prospects about matching gifts because some people don't even realize that they work for a matching gift company.

  Corporate matching gifts do count toward a donor's total giving for purposes of recognition. For example, a person who gives $500 and has a 1:1 match by his employer would be recognized by SJU as a Fellow. Matching funds must be received by SJU prior to the end of the fiscal year.

  Matching gift procedures vary from company to company. To have their gift matched, donors who work for matching companies (or whose spouses do) need to get a matching gift form from their employer and send it to SJU. SJU then verifies the donor's gift and returns the form to the appropriate employer. The company then sends the matching money to SJU. However, some employers take six months or more to send the check, so donors will want to give early in the fiscal year to guarantee that the funds are matched before fiscal year end.

- Take some time before contacting alumni to reflect on why Saint John's is important to you and why you support the University. Explaining your own reasons for being actively involved with Saint John's can often help persuade a reluctant alumnus to do likewise.

- Listening to what the person has to say can be as important as what you say. After asking for the gift, wait and listen. (Yes-WAIT, do not continue the conversation until the other person speaks!) Allow him to consider your request. He may agree, suggest a different amount, or explain his reasons for not giving. What he tells you in the course of your conversation can be full of clues as to how interested he is in Saint John's. Listen carefully and tailor your responses accordingly.

- Once someone agrees to an amount, secure how they intend to pay for the gift by obtaining a check or getting credit card information. This will assist in securing the gift. If they are not able to pay during your conversation, find a way or timeline that works for them and state that you will be following up on the scheduled date. You can always let him know that you can record a pledge, after other options are explored. Stating that you will follow-up personally will also help secure any pledge.

- Remember that a "no" to the amount you suggest doesn't necessarily mean that the prospect won't give something. Be prepared to negotiate an amount that works for the prospect.

- If a prospect will not donate, be sure to thank him for his time and encourage him to get involved with SJU in some other aspect. He can learn about the Alumni Association at **www.sjualum.com.**

- At some point, you will most likely contact someone who just doesn't want to hear what you have to say. As John D. Rockefeller, Jr. once said, "Never think you need to apologize for asking someone to give to a worthy object, any more than as though you were giving them an opportunity to participate in a high-grade investment."

Overcoming Objections

While they may not work all the time, these responses may be helpful when you are faced with objections. Listening to and discussing these objections can be your greatest tool in reminding your classmate why he loves Saint John's. Please record any objections in your contact report. Such information helps Saint John's address issues that concern alumni and friends.

- **I don't agree with Saint John's policy on _____, and I can't in good conscience support the Annual Fund.** "Well, I can understand your feeling. I will pass along your comments to the staff. *(Write down all comments he makes and answer any questions.)* However, it seems a shame to cut off your support for one reason, albeit an important one, when there are so many great reasons to support Saint John's! Surely there were policies at Saint John's with which you did not agree when you were a student, yet you didn't leave. Saint John's was an excellent place of higher learning before...and remains so now. I hope that you will reconsider!"

- **I give to other charities or another university.** "That's great! I'm sure that the organization really appreciates your contribution. I realize your priorities may be different or changing, but alumni support is crucial to maintaining the Saint John's experience for today's students. Please consider how unique and important a place Saint John's is to you and give what you can afford.

- **I've lost touch with Saint John's.** "Well, now is a great time to connect!" Talk to them about all the exciting things happening at SJU.

- **Why should I help?** I didn't receive any financial aid: "Tuition and fees only cover 3/4 of the cost of educating a student—and this has always been true. Even if you didn't receive financial aid, you benefited from the contributions of those who went before."

- **Tuition should cover costs.** "Unbelievable, I know, but tuition doesn't cover costs now and it didn't when we were at Saint John's. It covers about three quarters of the cost of the Johnnie experience.

  Or…

  "In fact, 90 percent of students receive financial aid. I know I received it, and I want to support that for current Johnnies. Saint John's was recently included among 43 "Best Buy" colleges in the *Fiske Guide to Colleges.*"

- **I'm still paying back my loans!/I'm in Grad school!** "I understand. Most of us are in a similar place with our own college debt. I would still like to see you participate on some level this year, though. We're focused on making the Johnnie Experience stronger and more accessible. We believe that by getting in the habit of giving now, even with a gift of $___, you will help strengthen alumni culture in the future. We're excited about what that could mean for students."

- **My son wasn't accepted by Saint John's, so why should I give?** "I am sorry to hear that your son was not accepted to Saint John's. That must have been a disappointing experience. Some excellent students are not accepted for various reasons. I hope that your son's experience at (the other institution) is/was satisfying. [Be empathetic.] But, I hope you could consider giving because of *your* positive experience as a student and as an alumnus."

- **I can't commit right now, just send something out.** Simply making it clear that you'll be following up can break right through this barrier. Then, thank him for his time and do follow up.

FY11 Class Giving Statistics

Class	Original Class Size	Solicitable Class Size	Donors	Fellows	Annual Fund	Total Given*	Participation
1960 and Prior	1,974	1,819	988	180	$446,500	$1,980,881	54.32%
1961	212	199	113	20	$64,637	$255,438	56.78%
1962	227	206	113	19	$59,635	$74,576	54.85%
1963	235	220	90	17	$96,179	$527,076	40.91%
1964	295	282	123	23	$64,321	$233,699	43.62%
1965	237	228	106	15	$79,572	$2,083,020	46.49%
1966	237	233	81	9	$30,619	$84,901	34.76%
1967	265	258	92	11	$46,172	$128,722	35.66%
1968	307	297	91	16	$31,583	$36,013	30.64%
1969	340	331	127	14	$36,684	$45,286	38.37%
1970	357	348	133	22	$135,319	$222,737	38.22%
1971	334	324	114	21	$94,722	$174,188	35.19%
1972	329	309	121	19	$63,361	$98,248	39.16%
1973	339	328	100	19	$54,194	$66,916	30.49%
1974	363	357	121	16	$93,558	$210,788	33.89%
1975	372	367	111	23	$87,310	$105,440	30.25%
1976	376	368	117	11	$61,406	$127,303	31.79%
1977	399	394	109	22	$62,058	$116,899	27.66%
1978	367	350	129	23	$70,122	$830,540	36.86%
1979	382	376	103	18	$49,231	$86,952	27.39%
1980	400	395	101	18	$47,996	$74,216	25.57%
1981	420	412	134	25	$65,270	$157,920	32.52%
1982	446	440	117	16	$49,778	$258,057	26.59%
1983	428	425	126	26	$59,583	$186,773	29.65%
1984	476	469	100	16	$43,238	$110,408	21.32%
1985	427	422	105	11	$59,571	$99,486	24.88%
1986	429	421	95	10	$27,099	$29,506	22.57%
1987	471	466	99	5	$18,161	$22,085	21.24%
1988	488	484	106	8	$40,365	$64,344	21.90%
1989	473	469	100	10	$25,308	$62,118	21.32%
1990	450	449	88	15	$30,320	$66,570	19.60%
1991	500	492	117	26	$64,765	$91,455	23.78%
1992	509	507	94	12	$35,303	$39,700	18.54%
1993	472	469	73	5	$16,066	$19,806	15.57%
1994	464	462	74	4	$15,511	$17,881	16.02%
1995	409	406	58	6	$39,408	$44,173	14.29%
1996	431	431	71	7	$20,564	$21,821	16.47%
1997	455	452	76	5	$15,177	$17,207	16.81%
1998	412	411	68	4	$11,395	$13,015	16.55%
1999	430	430	75	6	$17,288	$19,148	17.44%
2000	433	432	84	5	$15,914	$16,878	19.44%
2001	440	437	90	6	$13,477	$16,303	20.59%
2002	451	451	78	0	$8,596	$8,971	17.29%
2003	461	460	74	3	$12,102	$19,612	16.09%
2004	538	537	77	6	$11,220	$15,770	14.34%
2005	511	505	65	0	$5,054	$5,404	12.87%
2006	461	456	65	2	$6,034	$7,019	14.25%
2007	502	498	72	0	$5,397	$6,297	14.46%
2008	532	529	67	0	$4,445	$6,575	12.67%
2009	476	473	60	1	$4,553	$5,863	12.68%
2010	516	510	79	0	$5,267	$6,347	15.49%
2011	484	484	85	0	$2,100	$2,365	17.56%
TOTAL	**22,742**	**22,278**	**5,855**	**776**	**$2,523,510**	**$9,022,719**	**26.28%**

* This table includes cash received in FY11, but does not include new gift commitments (planned or future gifts) made.

Volunteer Confidentiality Agreement

Purpose:
To provide volunteers with an understanding of the standards regarding use of confidential information.

Guidelines:

1. Information provided to volunteers about specific constituents (including personal, business, and giving information) is considered strictly confidential.

   This information is to be used by volunteers solely in the performance of their duties as volunteers for Saint John's

2. Information shared with volunteers should be done on a "need to know" basis.

   Volunteer leaders are responsible for communicating this policy to other ambassadors at the time of transfer of confidential materials.

3. Information may not be transferred to any party outside the volunteer system without prior approval from SJU Institutional Advancement Staff.

4. The information received is not to be used for any purposes other than those for which it has been provided.

5. Use of confidential information to market or sell products or services, or use in the solicitation of funds or for programmatic purposes for any entity other than SJU, is expressly prohibited.

6. Proper disposal of confidential information includes shredding printed materials, deleting electronic files or returning the information to SJU.

7. All volunteers are required to adhere to this policy.

Print Name: _____

Signature: _____ Date: _____

Please sign this page and return it to Saint John's.
Annual Giving, P.O. Box 7222, Collegeville, MN 56321