Dear Parent Volunteer:

We're pleased to provide you with a copy of the Parent Volunteer Handbook. This handbook is designed to include most of the information that you'll need to carry out your volunteer responsibilities during the next ten months.

Occidental relies on parent gifts each year to help support the current operating budget of the College. Last year, Occidental parents contributed more than $475,000 to the Parents Fund and $229,110 to capital needs (primarily to the Ted Mitchell Scholarship fund). Although this is an impressive sum, we believe there is an even greater potential for the Parents Fund program. This year, we've set a goal of $600,000 for the Parents Fund; this goal can only be reached with your help!

As a Parents Association volunteer and member, you'll play an important role in helping the College achieve these results. We thank you for your willingness to give your time and resources as a volunteer leader in support of Occidental College, and look forward to working with you throughout the year.

Best regards,

Diane Nelson McGrail ’74 P’05 P’07

Lawrence McGrail P’05 P’07
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   ▪ Suggested script for solicitation calls

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<thead>
<tr>
<th>In Left Side Pocket</th>
<th>In Right Side Pocket</th>
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</thead>
<tbody>
<tr>
<td>2006–2007 Parents Handbook</td>
<td></td>
</tr>
<tr>
<td>Matching Gift Card</td>
<td></td>
</tr>
<tr>
<td>Fall 2006 Talking Points</td>
<td></td>
</tr>
</tbody>
</table>
Mission:

- To assist Occidental College in accomplishing its educational objectives through sponsoring activities which will provide parents with an opportunity to become more familiar with Occidental College's educational mission and College administrators, faculty, students, alumni, and other parents.
- To represent Occidental College by helping to communicate its genuine concern for all those involved with its educational enterprise and to help perpetuate a welcoming and friendly atmosphere.
- To provide a forum for sharing experiences, activities, accomplishments, and overall campus life concerns, as well as general fellowship with other parents. To offer annual financial support of College programs through the Parents Fund.

Goals:

Program Committee:
1. Continue to improve programming for parents at New Parent Orientation and Homecoming/Family Weekend.
2. Encourage parent attendance at Road Scholars series through personal phone calls and e-mails.
3. Work with Director of Parents Association, and Alumni Relations staff to plan new programs for parents beyond Homecoming/Family Weekend.
4. Volunteer as a caller, host, greeter, etc., for parent events.

Development Committee:
1. Find new ways to increase parent support of the Parents Fund.
2. Work with the Annual Giving staff to set and achieve goals for parent fundraising.
3. Increase the number of leadership gifts ($1,000 and above) through parent volunteer solicitations.
Development Committee Volunteer

Objectives of Position:
- Act as an ambassador to affiliate parents and families with the College
- Assist the Director of Parents Association with parent solicitations to ensure that the Parents Fund reaches the dollar goal

Terms of the Position:
- One-year, renewable

Responsibilities
- To make a gift or pledge to the Parents Fund prior to conducting solicitations of others, at a level commensurate with ability, preferably at the President's Circle or the William Stewart Young Society level; your gift will serve as an example for parents to follow
- To aid the College in creating solicitation messages for parents
  - Solicit leadership gifts from assigned prospect group (between five–ten individuals)
  - Participate in pledge reminder efforts
  - If able, attend and encourage other parents to attend College–sponsored events such as New Parent Orientation, Homecoming/Family Weekend and the Road Scholars series

Time Commitment:
Approximately 20 hours, over a one–year term

August 26: If able, attend New Parent Orientation from 8:00 AM to 12:00 PM

September/October: Make a gift or pledge to the Parents Fund!

September 8 & 9: If able, attend Volunteer Leadership Conference

October 20 & 21: If able, attend Homecoming/Family Weekend; specifically, attend Parents Reception on Friday evening and President's and Deans' Breakfast for parents on Saturday morning

November: Participate in Parents Association conference call (date TBD)
<table>
<thead>
<tr>
<th>Month</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>November</td>
<td>Make solicitation calls to leadership parent prospects</td>
</tr>
<tr>
<td>December</td>
<td>If able, attend leadership recognition event in Los Angeles and/or leadership Holiday Party in San Francisco. (Date, time, and location TBD)</td>
</tr>
<tr>
<td>December</td>
<td>Make pledge reminder calls to parents</td>
</tr>
<tr>
<td>March</td>
<td>Participate in Parents Association conference call (date TBD)</td>
</tr>
<tr>
<td>March/April</td>
<td>Make solicitation and pledge reminder calls to leadership parent prospects who have not yet given to the Parents Fund</td>
</tr>
<tr>
<td>May</td>
<td>Participate in Parents Association conference call (date TBD)</td>
</tr>
<tr>
<td>May/June</td>
<td>Assist Director of Parents Association with year-end solicitations and pledge reminder calls to parents</td>
</tr>
</tbody>
</table>
Program Committee Volunteer

Objectives of Position:
- Act as an ambassador to affiliate parents and families with the College
- Increase participation at events among parents and families of the College

Terms of the Position:
- One-year, renewable

Responsibilities
- To make a gift or pledge to the Parents Fund at a level commensurate with ability, preferably at the President's Circle or the William Stewart Young Society level; your gift will serve as an example for other parents to follow
- Work with Director of Parents Association to coordinate New Parents Orientation, Homecoming/Family Weekend, parent participation with Road Scholars series, and other parent events
- Attend and make calls to encourage other parents to attend College-sponsored events

Time Commitment:
Approximately 20 hours, over a one-year term

*Please note the Road Scholars series and other parent event dates will be announced when confirmed during the year. Program Committee members will be asked to help when needed on these regional events.*

August 26 & 27: If able, attend New Parent Orientation
September/ October: Make a gift or pledge to the Parents Fund!
September 8 & 9: If able, attend Volunteer Leadership Conference
October 20 & 21: Attend Homecoming/Family Weekend; specifically, attend Parents Reception on Friday evening and President's and Deans' Breakfast for parents on Saturday morning
November: Participate in Parents Association conference call (date TBD)
December: If able, attend leadership recognition event in Los Angeles and/or leadership Holiday Party in San Francisco (time, date, and location TBD)
<table>
<thead>
<tr>
<th>Month</th>
<th>Task</th>
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<tbody>
<tr>
<td>March</td>
<td>Participate in Parents Association conference call (date TBD)</td>
</tr>
<tr>
<td>May</td>
<td>Participate in Parents Association conference call (date TBD)</td>
</tr>
<tr>
<td>May/June</td>
<td>Assist with year-end solicitation and pledge reminder calls to parents</td>
</tr>
<tr>
<td>Goal</td>
<td>Amount</td>
</tr>
<tr>
<td>----------------------------------</td>
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</tr>
<tr>
<td>Total Dollar Goal</td>
<td>$4.050 M</td>
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<tr>
<td>Alumni Fund Goal</td>
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<td>Parent Fund Goal</td>
<td>$600,000</td>
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<tr>
<td>Faculty/Staff Fund Goal</td>
<td>$39,000</td>
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<tr>
<td>Other Individuals Goal</td>
<td>$161,000</td>
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<tr>
<td>Alumni Participation Goal</td>
<td>46%</td>
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<tr>
<td>Total Dollar Goal (includes all)</td>
<td>$16.050 M</td>
</tr>
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</table>

*Includes gifts from all sources to current, capital and endowment funds*
## PARENTS FUND REVIEW

### PARENTS CURRENT FUND DOLLARS

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<thead>
<tr>
<th>Fiscal Year</th>
<th>Dollars</th>
</tr>
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<tr>
<td>FY2000</td>
<td>$115,464</td>
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<tr>
<td>FY2001</td>
<td>$156,285</td>
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<tr>
<td>FY2003</td>
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<td>FY2005</td>
<td>$480,974</td>
</tr>
<tr>
<td>FY2006</td>
<td>$477,850*</td>
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*Does not include $229,110 in parent capital gifts, most of which were directed to the Ted Mitchell Scholarship Fund.

### PARENTS FUND DONORS

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Donors</th>
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<tbody>
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<td>FY1999</td>
<td>544</td>
</tr>
<tr>
<td>FY2000</td>
<td>598</td>
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<tr>
<td>FY2001</td>
<td>822</td>
</tr>
<tr>
<td>FY2002</td>
<td>836</td>
</tr>
<tr>
<td>FY2003</td>
<td>916</td>
</tr>
<tr>
<td>FY2004</td>
<td>1152</td>
</tr>
<tr>
<td>FY2005</td>
<td>1377</td>
</tr>
<tr>
<td>FY2006</td>
<td>1519</td>
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<tr>
<td>PARENTS FUND GOALS</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td></td>
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<tr>
<td>Parents Current Fund Goal FY2007</td>
<td>$600,000</td>
</tr>
<tr>
<td>Parents Fund Donor Goal FY2007</td>
<td>1575</td>
</tr>
</tbody>
</table>
WHY SUPPORT OXY?

The Actual Cost of Educating an Occidental Student

Every Occidental student benefits from parents fund gifts, whether or not they receive direct financial aid. Amazingly enough, tuition and room and board at Occidental today covers just 60% of the actual cost of an Oxy education. Without gifts from parents, the price of an Oxy education would be significantly higher than it is today.

Investment in the Value of an Oxy Degree

Many alumni feel that their personal and professional opportunities have been enhanced by the reputation of their Oxy degrees. Occidental depends on unrestricted gifts to maintain each of the outstanding programs that contribute to the College's national reputation. By giving to the College, parents can invest in the value of their students' Oxy degrees.

In addition, gifts to Oxy are an investment in the future of our communities: today's students will be tomorrow's leaders in all walks of life.

Lifelong Association

Their student's experiences at the College may inspire parents to identify with Oxy for the rest of their lives. Parents may contribute to the College because they wish to endorse the mission and accomplishments of a special institution.

Recognition

Many who support causes do so out of pride of association. Donor recognition programs give the College a wonderful opportunity to extend a meaningful thank-you to its supporters. Such recognition often encourages contributors to continue to give, and to increase their support.

Excellence in Education

Gifts to the Parents Fund provide Occidental with essential unrestricted gift income each year. Unrestricted annual gifts are critical to
the health of the organization because they enable Oxy to sustain its tradition of excellence in academics, athletics, and student life.

Keeping Tuition Competitive to Attract the Best Students

Oxy endeavors to keep tuition as low as possible in order to remain competitive among the nation's best small liberal arts colleges. At the same time, each year educational costs—such as financial aid and technology—continue to rise at a pace well above the rate of inflation. Parents Fund gifts play a critical role in helping to meet those expenses and ensuring that Oxy remains competitive in its ability to attract and retain the best students.

The Habit of Giving

Parents whose child attended a private high school are more likely to be in the habit of giving. They aren't shocked by requests to give an extra measure of support beyond tuition payments. In addition, as a student progresses through his/her years at Oxy, the parents' interest in the College may grow, and they may become more personally involved with its mission and purpose.

Building Relationships

Development is more than the implementation of fundraising programs to generate cash receipts. Development is relationship building, and the Parents Fund helps build those relationships. Involving potential donors with the College is important. Too often, we think of volunteering as commitment of time: working on a committee, participating on a panel, serving on a board. We should also remember that the act of giving is an act of volunteerism.

Securing the Future

Individuals who consider themselves investors or stockholders in the College feel a greater sense of responsibility for Oxy. Donors feel that they've invested in the College, and are in partnership with the administration and trustees. All donors to the Parents Fund help Oxy ensure its future.
TECHNIQUES FOR EFFECTIVE SOLICITATIONS

- Be positive and optimistic
  - Have a smile on your face!
  - Your frame of mind will be reflected in the tone of your voice

- Be specific about why you are calling
  - A little conversation is fine, but it's important to get to the point of your call

- Ask for a specific dollar amount
  - The phrase “Would you consider a gift of $___ this year” can be quite effective

- Be silent, even if it is uncomfortable
  - Let the prospect begin the conversation again

- Don’t be bashful about starting with the highest gift level
  - It’s possible to negotiate down, but it’s impossible to negotiate up
  - Remember to mention the gift installment options; gifts can be made throughout the year and will be counted as long as they are made by June 30
  - Inquire about the donor’s eligibility for matching gifts

- Prospects may want more time to consider solicitation requests of larger amounts
  - This is understandable; say that you’ll call back (in a week or two) and be sure to follow through

- Be prepared to handle objections
  - Knowledge of Oxy is important in handling objections
  - If a parent has a specific criticism of the College, listen and answer the objections to the best of your ability
  - Feel free to say, “I don’t know, but I’ll find out and get back to you”
  - If your prospect requests information, promise to get it and follow through

Whatever the outcome of your solicitation, thank the prospect for their time!
As a volunteer, you have the most influence on the inclination variable of the giving equation by developing your prospect's interest in SUPPORTING OCCIDENTAL!

THE $ “ASK” AMOUNT...

- is the best possible estimate of the level at which a parent is both capable and inclined to support Occidental, based upon giving history
- is a starting point for negotiation with the parent about her/his gift
- is a reflection of the level of support needed by Occidental College
- is not necessarily equal to the amount of the gift that a parent will give – an ask amount should be greater than the previous gift

Obviously, capability alone does not determine whether or not a parent will give. As an “ambassador” for Occidental and an “advocate” for philanthropy, your conversations with your prospect will serve to...

- raise awareness about Oxy's need for support
- provide news about what is happening at Oxy today
- provide an “ear” for concerns about Oxy and dispel any misperceptions
- gather information about what is going on in their lives, as well as about their capability and inclination to support Oxy in the future
The Lead Letter

A letter will be sent to each of your assigned prospects introducing the case for annual support of Occidental. We depend on you to make a follow-up call and negotiate the level of the gift.

Prepare Yourself

Most prospects want to know the answers to two questions: “Why does Oxy need money?” and “How much do they want?” Be ready to answer these questions. Think about your own reasons for supporting Occidental, and develop a brief statement in your own words about why you believe support for Oxy is important. Read through this handbook. You do not need to memorize it, but you should know where to find the answers to both general and specific questions. Plan how best to approach your prospect. Review the phone card. Also, remember to ask if a matching gift company employs your prospect. Matching gifts count toward gift society levels.

Ask Amount

The ask amount is based on prior giving history. If there is no giving history, the ask amount should start at the President’s Circle level with a gift of $2,500. The ask amount may sometimes seem high, but remember that it is the starting point for negotiation. It is possible to negotiate down; it is impossible to negotiate up. Start with the suggested ask amount and negotiate downwards, if necessary. Don’t be bashful about starting at a high level.

Above all, do not underestimate your prospect's capacity and willingness to give. Since people often are inclined to do what is expected of them, keep your expectations high.

The Call

- *Explain* why you are calling
- *State the case for support* as outlined in the solicitation letter
 Stress the importance of unrestricted gifts to the college – that the President can direct these gifts to the most pressing academic or institutional needs

 Ask for the specific amount suggested on the phone card. Be considerate, but firm: “We hope that you will consider a gift of $_____.” STOP. BE SILENT. Give your prospect time to think. The silence may feel awkward, but let your prospect be the first to resume the conversation.

 Persist. If the prospect objects to the amount of the gift, work your way down the giving ladder by asking for a lower amount. Always negotiate a gift higher than the previous year.

 If the prospect objects to giving a gift at all, respond to their objections with another compelling reason why it is important to support Occidental.

 Get a specific commitment. Vague promises seldom pay off—“Well, I will send something” or “Send me the card, and I will send a check.” Try to get the prospect to commit to a minimal amount with the understanding that he or she may add to the amount when they send in the reply form.

 Then what? Call again. Prospects may want time to consider making a larger gift. Therefore, several calls may be necessary to “close” a gift. Determine the time and place for the next conversation at the end of the discussion. Keep the process actively moving toward a commitment.

 Follow up. Your conversation may uncover several areas of interest or concern. Please do not hesitate to contact the Annual Giving office with questions or requests for information. Once you have begun a dialogue, stay in touch; a solicitation may take several weeks, or even longer, to complete.

 Thank the donor. Acknowledge your prospect’s commitment with a personal note. The Office of Annual Giving will provide you with thank you cards, or you can use your own stationery if you prefer. The Annual Giving Office will thank each donor upon receipt of a gift, but it is especially important for you to add your own thanks. Please be sure to copy the Office on any correspondence you may have with your prospects, so the College may build a more complete history of each prospect’s relationship with Occidental.
<table>
<thead>
<tr>
<th>Amount</th>
<th>Society</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10,000 or more</td>
<td>President's Cabinet</td>
</tr>
<tr>
<td>$5,000–$9,999</td>
<td>President's Circle Sponsors</td>
</tr>
<tr>
<td>$2,500–$4,999</td>
<td>President's Circle</td>
</tr>
<tr>
<td>$1,000 – $2,499</td>
<td>William Stewart Young Society</td>
</tr>
<tr>
<td>$750 – $999</td>
<td>Robert Cleland Society</td>
</tr>
<tr>
<td>$500 – $749</td>
<td>Clarence Spaulding Society</td>
</tr>
<tr>
<td>$250 – $499</td>
<td>Myron Hunt Society</td>
</tr>
<tr>
<td>$150 – $249</td>
<td>Occidental Associates</td>
</tr>
<tr>
<td>$1–149</td>
<td>Donor</td>
</tr>
</tbody>
</table>

All donors to the Parents Fund are recognized as members of one of Occidental's gift clubs for the fiscal year in which their gifts are made. Membership runs from July 1 to June 30 each year. Occidental recognizes matching gifts when determining membership levels.
Sponsoring a Current Year Scholarship is a unique opportunity to be directly involved in the education of an Occidental student. Previously, individuals could establish a scholarship only by means of an endowed fund. Now, through the Current Year Scholarship program, donors may provide direct scholarship assistance for current students. This enables benefactors to engage with some of Occidental's most talented and promising students – and to make a difference in their undergraduate education.

Individuals may support a Current Year Scholarship with a gift of $10,000 funded within one fiscal year – the equivalent of a $200,000 endowed gift. This funding will provide a one-year named scholarship that will be awarded to a promising and talented student with financial need. Students awarded a Current Year Scholarship will be selected during the summer following the fiscal year in which the gift was made. Donors will be notified of the student selected to receive their scholarship in the fall semester and they will be invited to meet their scholarship recipient at an annual luncheon on campus during the spring semester.

Undergraduate Student Research Scholarships
$5,000

The hallmark of an elite, private liberal arts college is the opportunity for students to interact directly with faculty. Occidental encourages undergraduate research with faculty advisors as a key component of the Occidental experience – and provides unique opportunities for students to participate in research and related scholarly endeavors. Donors may support these efforts by sponsoring a named Undergraduate Student Research Scholarship with a gift of $5,000 funded within one fiscal year. This funding will provide a stipend, laboratory or other research costs, and summer housing for one student. Students awarded an Undergraduate Student Research Scholarship will be selected during the fiscal year in which the gift is made for research to be conducted the following summer. Donors will be invited to meet their scholarship recipient at the Occidental Summer Research Conference in July.
Academic Quad Benches
$5,000 or $7,500

If you have a family member, friend or event you would like to commemorate, consider making a tax-deductible gift to name a bench at Occidental College. There are eight-foot benches available for $7,500 and six-foot benches for $5,000 located on the Academic Quad. An attractive brass dedication plaque is installed on these beautiful teak benches.
Spring 2006

Name
Address
City, ST Zip

Dear [NAME] and [NAME],

This year marks another impressive record for the admissions office at Oxy—5,200 applications! With your student here on campus, you can exhale with relief. Your child is already established at an institution that ranks as one of the nation's finest liberal arts colleges.

And exceptional colleges create opportunities for exceptional accomplishments. Senior Patrick Dixon has been named a Marshall Scholar. Fourteen students have been accepted for the National Conference on Undergraduate Research, an annual spring event where students display their findings at the national level. Scholar-athletes on the Oxy football team experienced another outstanding year on the playing field — as 2005 SCIAC Champions. The men's Tiger basketball team made it to the second round of the NCAA playoffs and the women's team ended the season with their first winning record in a decade.

The progress of the College encourages us to continue making our own gifts to Oxy, and to ask all parents to join us in supporting the Parents Fund. Gifts to the Parents Fund aid Oxy in its mission to provide a superior education that focuses on commitments to academic excellence, diversity, the community, and service to others. We believe strongly in this mission, and are dedicated to supporting the future of the College and future generations of students.

Please join us today in making a gift to the Parents Fund; a contribution at the President's Circle level — $2,500 — helps to provide financial aid, to fund exceptional faculty and to maintain the beautiful campus. Oxy offers monthly or quarterly installment options so that the pledge you make now can be fulfilled with gifts during the balance of the fiscal year through June 2006.

We urge you to respond as generously as you are able, keeping in mind that our gifts increase the value of all Oxy degrees. We've included a reply card and envelope for your convenience.

We look forward to hearing of your participation in this year's Parents Fund. On behalf of the College, thank you in advance for your generous support.

With best regards,

Janet Miller P'06
Marshall Miller P'06

P.S. You can also visit Oxy's website at www.oxy.edu, click on “Support Oxy”, and make your gift to the Parents Fund today!
I. Introduce yourself

"Hello, this is ____________ a parent of an Occidental student from the class of __. I'm calling as a member of the Parents Association Development Committee. How are you?"

II. Talking Points

- Occidental received more than 5,300 applications for admission to the Class of 2010, setting a new record for the eighth consecutive year. Applications are up 4 percent over last year's record tally, and a remarkable 185 percent since 1997.

- Occidental students collected an impressive number of national awards, including a Truman, a Marshall, two Goldwaters, four Fulbrights, a Coro and a Strauss.

- Occidental faculty also received national recognition, including History Professor Nina Gelbart, winner of a Guggenheim Fellowship to further her research in France; Martha Ronk, Irma and Jay Price Professor of English Literature, awarded a PEN Center USA Literary Award for her latest collection of poetry; Geology Professor Margi Rusmore, whose research was featured on the cover of Science magazine; and Donna Maeda, associate professor of religious studies, named an American Council on Education Fellow.

- Occidental continues to be a national leader in undergraduate research. This year alone, we supported 347 student research projects in a wide range of fields, including 14 students who presented at the National Undergraduate Research Conference in April. Occidental will host the Southern California Conference on Undergraduate Research this fall.

- Construction is now underway on the College's largest-ever residence hall – a $29 million, 273-bed structure being built near the corner of Rangeview Avenue and Avenue 49 on the south side of campus. The four-story building is the first student residence built in 20 years and will help meet strong student demand for on-campus housing.
Occidental's ambitious master plan, which seeks to chart the physical growth of the campus over the next 20 years, has been submitted to the city of Los Angeles. This will kick off a lengthy review process that we believe will go to the City Council early in 2007.

Occidental Athletics continues to shine. The football team, undefeated conference champions last fall, is ranked nationally in three preseason polls. The nationally ranked men's basketball team made it to the second round of the NCAA playoffs. The nationally ranked women's water polo team made it to the national championship game. The men's and women's swimming and diving teams for the 16th consecutive year achieved Academic All-America status. Cross country runner Kevin Chaves '08 was named to the Division III Men's All-Academic Team. Diver Robert Dohring '08 was named an individual Academic All-American after becoming Oxy's first All-American diver since 1979.

In partnership with the Los Angeles Unified School District, Occidental has been awarded a six-year, $16.8 million grant from the U.S. Department of Education that will make it possible to expand its GearUp college prep program to every middle and high school in Northeast Los Angeles. GearUp's goal is to increase the number of low-income students enrolling in college.

III. Thank prospect for past support (if appropriate)

IV. Make the ask

"I am calling to follow up on Diana and Larry's recent letter asking for your support of the Parents Fund. In order to continue to build on the momentum generated by the College's accomplishments last year, Occidental has set a goal to raise $550,000 for the Parents Fund. To accomplish this, we are asking parents to join the:

- President's Cabinet with a gift of $10,000
- President's Circle Sponsors with a gift of $5,000
- President's Circle with a gift of $2,500
- William Stewart Young Society with a gift of $1,000

PLEASE NOTE YOU CAN SPLIT YOUR GIFT INTO MONTHLY INSTALLMENTS (monthly, quarterly, bi-monthly.)
May I count on you to join me in supporting Oxy this year with a gift of $____?"

If “NO"
"I certainly understand, we do like to offer all parents the opportunity to join but understand that kind of financial commitment may not be reasonable for everyone.

THEN
"If I may, I would like to mention a few other giving levels…

Robert Cleland Society  $750–$999
Clarence Spaulding Society  $500–$749
Myron Hunt Society  $250–$499
Occidental Associates  $150–$249
Donors  $1–$149

"Any gift/increased gift over last year is greatly appreciated and needed. That stated, can I mark you down for a gift of $_____?"

V. Share your reasons for giving; answer objections (see flip chart in the back pocket of your Parent Volunteer Handbook)

VI. Record the pledge

Ask your prospect if he/she would like to make a gift by credit card—this is the easiest and most efficient way to give. If so, write down his/her credit card number, card expiration date, name on the card and pledge amount. If your prospect does not want to give by credit card, take the pledge and ask when they plan to send the gift. Occidental accepts VISA, MasterCard, Discover, and American Express.

VII. Thank prospect for his/her time and support

Record any other pertinent information or notes on the TeleFund card.
<table>
<thead>
<tr>
<th><strong>FUNDRAISING TERMS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alumni Fund</strong></td>
</tr>
<tr>
<td><strong>Parents Fund</strong></td>
</tr>
<tr>
<td><strong>Current Funds</strong></td>
</tr>
<tr>
<td><strong>Unrestricted Support</strong></td>
</tr>
<tr>
<td><strong>Restricted Support</strong></td>
</tr>
<tr>
<td><strong>Matching Gifts</strong></td>
</tr>
<tr>
<td><strong>Endowment</strong></td>
</tr>
<tr>
<td><strong>Capital Gifts</strong></td>
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<td><strong>Planned Gifts</strong></td>
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<tr>
<td><strong>Fiscal Year</strong></td>
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