



Volunteer Handbook

A Message from Susan Cruse and Sonny Deriso 68C 72L

Dear Volunteer:

Thank you for your advocacy and determined leadership on behalf of Emory University. You are part of a long, distinguished tradition of volunteer engagement that has transformed our campus and augmented our unique strengths in education, research, patient care, and community service. We are grateful for your commitment to advance Emory to serve future generations.

Your collaboration is vital in helping us realize the goals of our comprehensive campaign: educating hearts and minds, improving health, resolving conflict, harnessing the power of the arts, and exploring new frontiers in science and technology. Since our public launch in September 2008, campaign priorities have taken on unprecedented urgency, especially in the areas of financial aid, faculty support, and program funding. A gift to Emory is an investment in our students, educators, researchers, and healers who seek to understand and resolve universal issues toward a common good.

A culture of philanthropy evolves from building lasting relationships. Your efforts in bolstering interest and involvement and helping forge partnerships will advance Emory's mission and vision. We are grateful for your intellectual, personal, and financial contributions. Know that we are eager to work with you to achieve success.

Thank you for your generosity and dedication.

A handwritten signature in cursive script that reads "Susan Cruse".

SUSAN CRUSE

Senior Vice President | DEVELOPMENT AND ALUMNI RELATIONS

A handwritten signature in cursive script that reads "Walter M. Deriso Jr.".

WALTER M. "SONNY" DERISO JR. 68C 72L

Chair, Campaign Emory | CHAIRMAN, ATLANTIC CAPITAL BANK



Contents

One:
Campaign Emory

Two:
Your Role as a Volunteer

Three:
Our Pledge to You

Four:
Campaign Emory Goals

Five:
Gift Vehicles

Six:
Endowments and Naming Opportunities

Seven:
Campaign Volunteer Structure

Eight:
Frequently Asked Questions

Nine:
Glossary of Terms

Ten:
Development Contact Information

Eleven:
Donor Bill of Rights



One Campaign Emory

CAMPAIGN EMORY provides critical funding to implement the priorities of Emory’s strategic plan, “Where Courageous Inquiry Leads.” The key themes and initiatives of the strategic plan are: strengthen faculty distinction; prepare students to be engaged scholars who use their knowledge and experiences to help others; create community and connect society through efforts in leadership development, diversity, sustainability, and work-life enhancement; understand religions and the human spirit; confront issues of race and difference; improve global health; and explore new frontiers in science and technology, including neuroscience, predictive health, and computational and life sciences.

To advance the overall mission of the university, funds support endowments for students, faculty, and programs; student scholarship programs in multiple units and financial aid programs such as Emory Advantage; faculty research and endowed positions; clinical and outreach programs; and new programmatic and building projects that will allow Emory to continue its progress as one of the world’s top universities. Campaign Emory funding priorities affect all of Emory’s schools and units and enable each academic unit to execute its own strategic plan as an integral part of the university-wide plan.

Through private philanthropic investment, anyone with an interest in Emory— from leaders of big corporations to Emory students—has an opportunity to participate in Campaign Emory. Few other organizations can have the broad, comprehensive impact of a major research university. From educating the next generation of leaders to discovering cures for disease, from understanding what it means to be human to interpreting history in an effort to inform the future, Emory’s investors have a unique opportunity to see their gifts at work. The enduring legacy of Campaign Emory is nothing less than creating positive transformation in the world.

Campaign Emory is for everyone. All gifts to Emory matter, and participation at every giving level is significant and highly valued.



Two

Your Role as a Volunteer

*You are an important representative of Emory,
and your involvement is critical to the success of our campaign.*

YOUR PURPOSE:

To work with Development and Alumni Relations to identify, cultivate, and solicit potential partners for financial support.

YOUR QUALIFICATIONS:

- Current annual and/or principal donor.
- Proven leader and enthusiastic advocate of Emory.
- Commitment to increasing major gift support and broadening prospect base.

YOUR RESPONSIBILITIES:

1. Make meaningful, generous gifts to demonstrate passion for Emory's mission.
2. Work collaboratively with Development and Alumni Relations to secure short- and long-term investment by:
 - Leveraging personal capital to secure and steward private philanthropic gifts through the identification, cultivation, and solicitation of high-potential individuals, foundations, and corporations.
 - Participating in effective engagement and solicitation strategies.
 - Hosting or sponsoring events and activities to attract and involve constituents interested in the work of the institution.
 - Building a network of endorsers who can secure funding from a variety of sources.
 - Attending fund-raising events and activities.
3. Champion Emory's core values and principles. Serve as an ambassador in public and private sectors. Educate the community about Emory's people and programs. Understand and articulate specific campaign goals, the case for support, and giving vehicles.
4. Provide ideas, insights, feedback, and advice. Communicate often with Development and Alumni Relations. Maintain confidentiality about Emory's prospects, donors, and sensitive organizational information.



Three

Our Pledge to You

Your accomplishments as a volunteer are tantamount to the success of the campaign.

OUR PURPOSE:

To support our volunteers with vigor and provide necessary resources.

OUR RESPONSIBILITIES:

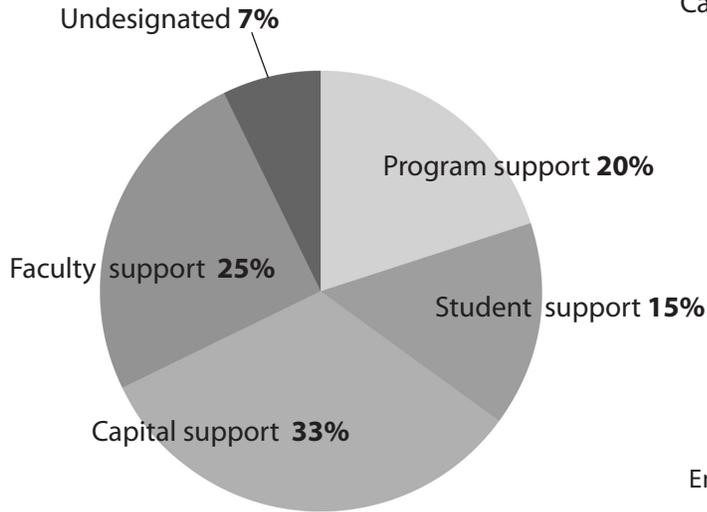
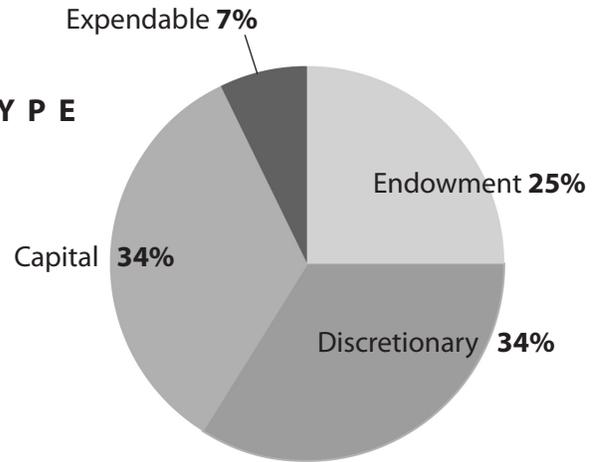
1. Conduct volunteer orientation and ongoing training sessions.
2. Work collaboratively with volunteers to secure short- and long-term investments by:
 - Translating comments, suggestions, and ideas into action.
 - Implementing prospect strategies.
 - Partnering with volunteers on solicitations.
 - Stewarding donors to encourage future gifts.
3. Provide necessary administrative assistance:
 - Event and meeting coordination.
 - Correspondence.
 - Proposal development.
4. Develop communication messages as needed and provide available collateral materials:
 - Case statements—university and unit
 - Campaign newsletter—*Campaign Chronicle*
 - University publications—*Academic Exchange, Clifton Community Partnership, Emory Health, Emory Magazine, Emory Overview, Emory Report, EmoryWire, Health Sciences Update, and Research News*
 - School-based publications—*Candler Connection, Emory Medicine, Emory Nursing, Emory Public Health, Emory in the World, Goizueta Magazine, Knowledge@Emory, Manuscript Archives & Rare Book Library of Emory University, Michael C. Carlos Museum eNewsletter, Molecular Vision, Emory Lawyer, Oxford Outlook, and Quadrangle*
 - Campaign stationery
5. Monitor and report campaign progress.
6. Appreciate and acknowledge the efforts of volunteers.

Four

Campaign Emory Goals

Gifts to Campaign Emory will strengthen a university that takes risks, pushes boundaries, and strives to make a difference in the lives of others.

BY GIFT TYPE



BY GIFT DESIGNATION

BY SCHOOL / UNIT

Campus Life	\$ 0.5 MILLION
Candler School of Theology	\$ 60 MILLION
Emory College of Arts and Sciences	\$110 MILLION
Emory Graduate School	\$ 10 MILLION
Emory Hospitals and The Emory Clinic	\$305 MILLION
Emory Law	\$ 35 MILLION
Emory Libraries	\$ 27 MILLION
Emory School of Medicine	\$500 MILLION
General University	\$133 MILLION
Goizueta Business School	\$ 75 MILLION
Michael C. Carlos Museum	\$ 35 MILLION
Nell Hodgson Woodruff School of Nursing	\$ 20 MILLION
Oxford College	\$ 40 MILLION
Rollins School of Public Health	\$150 MILLION
Woodruff Health Sciences Initiatives	\$ 65 MILLION
Yerkes National Primate Research Center	\$ 30 MILLION
TOTAL	\$ 1.6 BILLION



Five Gift Vehicles

THE INTENT OF COUNTING AND REPORTING is to reflect the total impact of fund-raising efforts, including all gifts, pledges, and deferred gifts. Gifts can be made with a credit card, check, electronic funds transfer, or even appreciated stock or other real and personal property. Deferred gifts can provide income for the donor and family, create tax benefits, and leave an important legacy.

1. OUTRIGHT GIFTS

- Cash, checks, credit cards (online giving available)
- Marketable securities
- Closely held stock
- Gifts in kind (other than real or personal property)
- Corporate matching gifts
- Real or personal property
- Realized planned gifts

2. PLEDGES (FIVE-YEAR PAYMENT OPTION)

3. IRREVOCABLE DEFERRED OR PLANNED GIFTS

- Charitable gift annuities
- Charitable remainder trusts
- Charitable lead trusts
- Life insurance
- Life estate gifts

3. REVOCABLE DEFERRED OR PLANNED GIFTS

- Bequest provisions
- IRA or other qualified retirement plan beneficiary designation
- Insurance plan beneficiary designation

Six

Endowments and Naming Opportunities

ENDOWED GIFTS TO EMORY ensure support for today while providing educational and research excellence and innovation far into the future. Endowed gifts are invested. A portion of the investment earnings is spent, while the original gifts are preserved as principal. In this way, endowed gifts have far greater earning power—a one-time gift lasts forever. Emory’s overall endowment supports education and research, financial aid, facilities, and the latest technology. With a strong endowment, Emory can recruit the best faculty, researchers, health care professionals, and students; keep up with new knowledge and develop new ways to share it; and attract the most visionary leaders.

Donors may restrict gifts for specific purposes such as establishing student scholarships, creating professorships, instituting new programs, or constructing new facilities. Unrestricted gifts can support general operations or special initiatives.

Endowment gifts must be accompanied by formal gift agreements. Endowments are typically named after the donor(s) or a person(s) the donor wishes to honor. They may be established by a one-time gift, a series of gifts, a pledge paid over a period of five years, wills, trusts, gifts of appreciated assets, or a combination of these. Gifts can be added to an established endowment at any time. The Emory University Board of Trustees and its appropriate committees—through the recommendations of the President’s Cabinet and the Office of Development and Alumni Relations—have established the following endowment funding minimums. Depending on specific program needs, the donor’s objectives, and the type of gift, higher amounts may be necessary to achieve the desired outcome:

- Leadership position \$5 million
- Faculty chair..... \$2 million
- Unit director or departmental chair \$1 million
- Faculty professorship..... \$1 million
- Faculty fellowship \$500,000
- Laboratory \$350,000
- Visiting professorship \$300,000
- Graduate fellowships..... \$300,000 | \$750,000 (honors)
- Scholarships \$100,000 | \$750,000 (honors)
- Lectureship..... \$250,000
- Book fund \$50,000
- Program support \$50,000



Seven

Campaign Volunteer Structure

Campaign Cabinet

Sonny Deriso 68C 72L
Campaign Chair

Ellen Bailey 63C 87B
Chair, University Programs

Rusty French 67C
Chair, Leadership Prospects Committee

Doug Ivester
Chair, Health Sciences

Teresa Rivero 85OX 87B 93MPH
Chair, Alumni Engagement

Susan Cruse
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Development and Alumni Relations*

Dan Macaluso
*Vice President,
Graduate and Professional Schools*

Maggi McKay
Vice President, Woodruff Health Sciences

Josh Newton
*Senior Associate Vice President,
Arts and Sciences*

University Programs Chairs

Jim Carson 61B
Goizueta Business School

Joe Edwards 54OX 56B 58B
Henry Mann 62OX 64C
Oxford College

James Gavin 70PhD
Emory Graduate School

Laura Hardman 67C
Campus Life and Athletics

John Morgan 67OX 69B
University Libraries

Jim Morgens
Courtlandt Ault
Michael C. Carlos Museum

Wendell Reilly 80C
Emory College of Arts and Sciences

Chilton Varner 76L
Phil Reese 66C 76B 76L
Emory Law

Bishop Mike Watson 74T
Candler School of Theology

Woodruff Health Sciences Center Chairs

David Allen 67C 70D 75DR
Beverly Allen 68C
Nell Hodgson Woodruff School of Nursing

Ada Lee Correll
Emory School of Medicine

Bill Dobes 65C 69M 70MR
Yerkes National Primate Research Center

Larry Klamon
Ann Klamon 65C 76L
Rollins School of Public Health

Emory Alumni Board Chairs

Dusty Porter 85C
Ed Cloaninger 91OX 93C
Campaign Committee



Eight

Frequently Asked Questions

What is a comprehensive campaign?

Comprehensive campaigns advance the mission of Emory forward in a significant, strategic direction. Fund-raising and other efforts across the university strengthen programs, support faculty, provide undergraduate and graduate scholarships, and enable cutting-edge research.

Why did Emory launch a campaign now?

The advance phase of Campaign Emory began on September 1, 2005. Emory's academic leadership, faculty, volunteers, and development staff members have been securing leadership gifts that provide the foundation for the overall success of the campaign. These leadership gifts focus on support from trustees, key volunteers, and the university's most generous and engaged donors. The public kickoff—held September 25, 2008—included a campus gala to thank early supporters, to unveil the objectives of Campaign Emory to a broader constituency, and to invite further investment from alumni and friends.

Even in this economic downturn, Emory's stakeholders in Georgia and around the world continue to invest in the university's vision for positive transformation in the world. To halt progress would diminish those endorsers' trust and their dollars. We cannot interrupt Emory's momentum, particularly as need has increased. If anything, we must intensify our activity.

In the current economic environment, why not spend more of the endowment to fill funding gaps?

Emory's endowment spending policy is designed to provide consistent revenue over time while ensuring that future generations of students and faculty receive at least the same level of support from the endowment that the current generation enjoys.

Will giving to Emory improve a student's chances of being accepted and/or receiving a scholarship?

Admissions and financial aid decisions are not related to contributions. Emory is a very competitive school, and the quality of education here is tied directly to attracting a wide range of talented young people.



Nine

Glossary of Terms

Annual fund—Annual, unrestricted, current-use support for Emory’s schools, colleges, and libraries.

Fiscal year—September 1 to August 31.

Gift planning—Emory’s Office of Gift Planning can provide guidance on giving strategies that can maximize benefits to the donor, heirs, and Emory. Donors also should consult with a personal financial advisor. Following is a sample of planned giving options:

- *Charitable gift annuity (CGA)*—Donated assets to Emory return a fixed payment, called an annuity, for life.
- *Charitable remainder trust (CRT)*—Donor receives a set percentage of income from the assets in the trust for life or a term of years. Emory receives the remainder of the trust at the end of the term.
- *Charitable lead trust (CLT)*—Emory receives income derived from the assets in the trust. At the end of the trust term, remaining assets and residual growth are passed on to heirs.

Gift types:

- *Capital*—A gift directed to major renovations, improvements, or new construction.
- *Discretionary*—An unrestricted or undesignated outright gift.
- *Endowment*—An invested gift whose principal remains intact in perpetuity while a portion of the earnings is distributed annually to support a donor-designated fund.
- *Expendable*—A one-time gift restricted for a specific purpose, program, or activity.

Major gift—A gift in the range of \$100,000 to \$999,999.

Pledge—A multiyear commitment divided into specific annual contributions.

Stewardship—Meaningful engagement with donors to demonstrate responsible management of the resources entrusted to Emory.

Ten

Development Contact Information

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Eleven

Donor Bill of Rights

PHILANTHROPY IS BASED ON VOLUNTARY ACTION for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the organization's most recent financial statements.
- To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgment and recognition.
- To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
- To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

This statement was developed by the American Association of Fundraising Counsel, the Association for Healthcare Philanthropy, the Council for Advancement and Support of Education, and the Association of Fundraising Professionals. It was adopted in November 1993.