

# PH NATHON

FAIRFIELD UNIVERSITY



## Supervisor Roles and Responsibilities

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**Job Description:** As a Phonathon Student Supervisor, you will assist in the coordination of the Annual Fund Phonathon Program by providing assistance to Marissa. Supervisors will provide peer leadership for Student Phonathon Callers in their assigned area and aid in any tasks that ensure quality control over the entire Phonathon program.

The Annual Fund's primary function is to increase donor participation and raise unrestricted money for the immediate needs of the University. It is our responsibility to help meet these goals through the Phonathon Program and as a Supervisor, it is your responsibility to maintain a successful program each and every calling shift.

**Compensation:** Pay for all Student Phonathon Supervisors is \$15/hour

### Requirements/Qualifications:

- At least 2 semesters of experience as a Phonathon Caller.
- Currently enrolled as a full time student at Fairfield.
- Proven understanding of what it takes to be a successful Phonathon Caller.
- Team player and leader during calling shifts.

### Shift Responsibilities:

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#### 1. Pre-Calling/Before Shift Begins at 6PM

- Arrive at the call center at 5:30pm.
- Set up the calling stations
- Make sure pens, notecards, and any other necessary materials are out of cabinets & easily accessible.
- Meet with Marissa to go over calling pools and important information about the day's shift.
- Take attendance & write down any important shift changes in binger.
- Help Marissa facilitate nightly announcements/hand out necessary scripts and answer any questions
- Announce 15-minute break at 7:30pm (Break will be no more than 20 minutes)

#### 2. During Shift (6-8:45PM)

- Make phone calls as normal

- Make sure other callers are working (not playing on cell phones or over-socializing)
- Check in with callers throughout the shift – and be available to answer questions or address concerns
- Maintain caller's motivation
- Observe, make notes, or forward any positive or negative feedback to Marissa (strengths and weaknesses, etc.)
- Log off around 8:45PM and begin clean-up
- Pass out Clorox wipes to all callers
- Proofread callers' notes for errors & make sure the note is well-written/good quality

### 3. After Shift (8:45-9PM)

- Announce 10-15-minute end of shift warning to other callers
- Proofread any remaining caller notes & make sure envelopes are stuffed correctly
- Fill out the mail slip (ORG #OR0092) and rubber band all notes together with mail slip – FLAPS UP! DO NOT CLOSE THE ENVELOPE YOURSELF – THE MAIL ROOM DOES IT FOR US!!!
- Make sure the room is clean & ready for the next day
  - Calling stations are clean
  - Notecards, scripts, pens etc. are put away
  - The chairs are put back in designated locations
  - All whiteboards are clean
  - All possible lights are turned off

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## Caller Roles and Responsibilities

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### **Job Description:**

Job Title: Fairfield University Student Phonathon Caller

Objective: To contact, thank and solicit Fairfield alumni and parents for contributions to the University. Callers will help to increase giving and participation, update alumni/parent records and share information about Fairfield.

Location: Calling Center – Location TBD

Hours: Sunday, Monday, Tuesday, Wednesday nights from 6-9pm. *(Arrive at Calling Center by 5:55pm)*

Rate: \$13/Hour

Manager: Marissa Fitzgerald '20

### **Duties and Responsibilities:**

- Returning callers: Be available for at least two nights of work per week – minimum of one definite night assigned and one night as a possible substitute for your peers.
- New callers: You must work two nights each week for your first semester as a caller
- Attend paid training session(s) before officially working as a caller
- Initiate telephone calls to prospective donors for the purpose of soliciting new or additional donations to Fairfield University.
- Maintain accurate addresses, phone numbers and personal information for each prospect.
- Keep all information confidential.
- Follow all of the guidelines for being a successful caller.
- Check your email and Group Me for updates or important announcements.
- Work a minimum of two optional/additional shifts per semester.
- Have the opportunity to volunteer to be in University photoshoots and attend events.

### **New Caller Application Link:**

[https://docs.google.com/forms/d/e/1FAIpQLSdw7KJHhRbgvS4eMNva7qymyCiPyxCFsXhd\\_QuPYirLizNgXA/viewform?usp=sf\\_link](https://docs.google.com/forms/d/e/1FAIpQLSdw7KJHhRbgvS4eMNva7qymyCiPyxCFsXhd_QuPYirLizNgXA/viewform?usp=sf_link)

### Application Process:

- **Applications are due by 11:59pm on Friday August 20<sup>th</sup>**
- You will then set up a time with Marissa for a phone interview, which resembles a “mock phone call” that you would have as a student caller.
- If you pass your phone interview, you will then be asked to set up either an in-person interview or virtual interview with Marissa

### Dates and Schedules:

- Both New and Returning **Caller training will take place on Sunday, Sept. 12<sup>th</sup>** from 10:30am – 2:30pm in the DSB 110. Lunch will be provided.
- **The Phonathon Program is scheduled from September 13<sup>th</sup> to December 13<sup>th</sup> for the fall semester.** Regularly scheduled calling will take place Sunday through Wednesday events from 6 – 9 p.m.
- Phonathon follows the University schedule so if the University is not open, whether due to a holiday or snow day, there will not be Phonathon.
- You will receive a master calendar at the beginning of the semester so you are aware of what days we do have and do not have Phonathon.
- You are expected to fulfill the scheduled days that you have selected. You will be given a master schedule at the beginning of the semester with the days you are working. It is your responsibility to find a substitute caller from the roster if you are unable to work a scheduled shift.



## **Successful Calling**

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### **Understand the Importance of the Fairfield Fund to the University**

(See "Reasons to Give" section)

### **Reflect on How the Fairfield Fund Affects You Personally**

The Fairfield Fund makes many activities and experiences possible across the campus. Do you participate in student activities? Do you receive financial aid? How have you benefited from the low student to faculty ratio – in depth discussions with professors, both in and outside of class? Personal attention from the departments on campus? Your own experience and appreciation will make your calls to alumni/parents powerful and persuasive.

### **Review the Prospects Information**

Before calling, review the alumni's/parent's ask amount and other pertinent information. Be sure to check out major, graduation year, and if they have children at Fairfield!

### **Remember: your calling is a critical component of the Advancement Office's work**

You are the face of today's Fairfield and an ambassador of the University. The impression that you make might be the only contact that the alum has with the University all year. Present yourself politely, never get angry, and always respect the alum/parent.

### **Gauge the Reaction of the Alum/parent**

If the alum wants to make a gift and get off the phone, just check their information quickly and move on. Some people may want to talk, but it is best not to draw out a conversation with a busy person. If necessary, skip the rapport section of the call.

### **Use Each Call as a Learning Experience**

After each call, ask yourself if there was anything you could have done better or if trying something new would work better. If you are getting a lot of unspecified pledges for several nights in a row, explore changes in your technique to improve your results. Review this Manual, or ask the evening supervisor or other callers for help at any time!



## Tricks of the Trade

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**Smile.** When you smile, your voice sounds friendlier. So, when the alum picks up, a smile (though over the phone) will sound more inviting, thus making it more likely you will connect with the alum.

**Ask Questions.** If you do not understand what the prospect is saying, then ask them to explain – it shows you are paying attention!

**Respond Intelligently.** Say Congratulations if they said they just purchased a home or had a baby! An occasional “yes, I understand” or “uh-huh” shows that you are still with them and is encouraging.

**Retirement.** Before you ask to update any employment information, take note of the alum’s graduation year. An alum with no employment information and a graduation year in the 60’s – THEY ARE PROBABLY RETIRED. However, this is not a guarantee...use your best judgement.

**Oldies.** The older alums ARE interested in how much they must donate in order to gain access into the “President’s Circle.” For more information, go to the “gift societies” section

**Construction Projects.** Informing the prospects about construction projects on campus encourage alums to participate in completing the task(s) at hand. This can also give you an opportunity to connect with your prospect.

**You’re a Student.** Prospects are more empathetic once they know they are talking to a current student. You and the prospect share a common experience, and the prospect will often offer advice. If the prospect refuses because they continue to pay off student loans, empathize with them. This leaves the prospect with a fond memory of their last contact with our office and will thus be more inclined to donate in the future with more money becomes available to them.

**Be Switzerland.** A lot of prospects are going to ask where you stand on particular issues. For example, a prospect might ask you about Fairfield’s response to BLM. They may ask you what political party you belong to. Playing the natural position will ensure that the prospect doesn’t attack you or your personal beliefs. One might respond “While I’m sure I have both democratic and republican professors; I still haven’t quite found a party identification.”

**Death.** Every once and a while, a prospect who has recently passed away will slip through the selection cracks. The worst possible thing you can do is continue conversation. If the prospect hadn’t already left Fairfield in their will, there is little possibility that your kind voice will be more convincing. However, offer condolences, sympathy, and apologies for being an interruption. Be sure to make a note in Razors Edge after the call.

**No habla español.** Several Phonathon callers are multilingual. If you’re one of them, identify yourself to your co-workers. We cannot dispose of a prospect because of a language barrier, the person picking up the phone may have valuable information about the prospect’s contact information, and may even contribute to our cause. Worst case scenario: put the person on hold and check to see if other callers speak the language.

**S/he does not live here anymore.** A select few prospects make it their job to make our job hard. Some submit false numbers to Fairfield (the morgue, the hospital, the local pizzeria). Apologize to the person on the other line and make note of the mistake in the comments section of Razors Edge. The prospects that take the phone call as an opportunity to have fun should be treated respectfully. Sometimes playing into their game creates a favorable relationship, and may cause the prospect to reconsider a donation.

**Sir, yes sir.** If the prospect is a Dr., Sgt., or a Lt., they should be addressed as so until (if) they give you an alternate salutation to address them by.

**Loud Noises.** Some prospects aren't too happy we called. The furious prospect is going to hold you personally responsible for ruining dinner, family time, the OC, and their sleep patterns. The best thing to do is apologize, apologize, apologize and wait for something to happen.

**Listen Effectively.** You have one opportunity and need to focus your attention on what the prospect is saying and how he/she said it. Be sensitive to tone but keep it positive. Listen for clues to help tailor your case for support. Are they unwilling or unable to give...this is different and requires a different approach.

- Unwilling – Tailor your response to common objections, develop rapport, and answer their questions...then ask again!
- Unable – Offer that they can pay in installments or go to the next ask level.

**Be Conversational.** The script is there to guide you through conversation. If you commit to the script, you will have a harder time dealing with a prospect's interruption...and you will sound awkward, unfriendly, and unconfident.





## Phonathon Lingo

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**Specified Pledge:** This is when a prospect gives a specific \$\$ amount and will fulfill via the mail.

**Unspecified Pledge:** This is when a prospect does not give a \$\$ amount and is considering a gift. For more information on how to negotiate this type of call go to the “unspecified pledge” section. Please avoid this type of call outcome!!

**Credit Card:** This is when the prospect commits to a \$\$ amount and then makes the gift over the phone via a credit card.

**Online Gift/Venmo:** The prospect commits to a \$\$ amount and says they will fulfill their pledge online or via venmo. Don't forget to share the venmo over the phone OR if they ask for email send then the relevant links.

**Refusal:** The prospect refuses to make a gift. If they say why (unhappy with university, angry etc). Please put that in the comments section.

**Callback:** The prospect picks up but does not have time to talk. Be sure to ask when the best time to reach them is. Be aware of the hours that we call during.

**Left Message:** The prospect did not pick up and you left a brief message on their voicemail explaining who you are and why you are calling.

**Needs Update:** This comes when you are updating their contact information. The prospect has a new address, phone number or email.

**LYBUNT:** Last Year But Unfortunately Not This – They have made a gift last FY but they have not renewed their gift for this year.

**SYBUNT:** Some Years But Unfortunately Not This – They have given some years but not this year.

**Rapport:** This is the part of the call where you get to build a relationship with the prospect. You ask them questions about their Fairfield experience and they will often ask questions about the campus, student life etc.

**The 3 Ask Rule:** Use this when navigating the ask part of the call. Be sure to always use this rule when dealing with a prospect who is unsure about the first ask. Don't forget to use giving statistics, Maeve's Starbucks Ask or facts about the university when making your appeal.

**Restricted Gift:** This is a gift that goes to a specific fund (Athletics, scholarship fund etc.)

**President's Circle:** This is a giving society specifically for donors who make a gift of \$1,000 or more. Check out the giving societies section for more information.

**Bellarmino Society:** This is a society for prospects who have left Fairfield in their will. While we don't call this groups specifically for a solicitation, we will occasionally call them as a special thank you calling.

**Young Alumni:** This is a group of alumni that have graduated in the last 10 years. This is a special group that often has special events and challenges. Be sure to check out the specific calling script.



## Calling Pools

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Throughout the year we will be calling a variety of different groups of alumni and parents. In this section you will find a list of the calling pools as well as scripts with talking point for each group.

- Young Alumni
- LYBUNTS
- SYBUNTS
- Anniversary Calling
- Golden Stags
- Current and Former Parents
- Athletics
- Specific Major/College
- Stagmates
- Reunion

### Young Alumni:

This group of alumni graduated from Fairfield within the last 10 years. Since these prospects are recent graduates they often are making less money, paying back student loans, getting married, having kids etc. They will often use these as reasons for not being able to make a gift. The key is to share with the prospect the importance of making a gift and how the students will benefit. The class ask or Maeve's Starbucks ask is a great way to get the prospect on board with a gift!

### LYBUNTS:

Last Year But Unfortunately Not This – This group made a gift last year but has not renewed their gift this year (yet!). The key to this call is to thank them for their previous gifts and ask them to renew. Many of the prospects in this type of calling pool give every year and often look forward to the call. They will either want to talk for hours or get the gift done and over with. As always create that relationship by asking questions and listen to what the alum has to say.

### SYBUNTS:

Some Year But Unfortunately Not This – This group has made a gift a few years ago but has not last year or this year. The key to this call is to thank them for any previous gifts and ask them if they would be interested in making a gift this year. These prospects know the call is coming but don't necessarily look forward to it. Your job is to get them to make their gift again. Always ask questions and listen to what they have to say!

### **Anniversary Calling:**

We do anniversary calling on a monthly basis based on when prospects made a gift the previous year. If they made their gift in September last year we will call them in September this year. The key is to thank them and ask them to renew their gift.

### **Golden Stags:**

This group of alum's graduated 50+ years ago from Fairfield. These prospects LOVE to talk about Fairfield and their life! The key to this call is to listen to their stories and ask questions about their time at Fairfield. This particular group we usually call during the day since they go to bed earlier so normal calling hours is not conducive to them. During these calls it is very easy to lose control of the call, since the golden stags love to talk – Be sure to keep the ask in your eyesight (this is the reason that you are calling!!)

### **Current and Former Parents:**

We usually call parents in conjunction with a challenge or when letters get sent home in the mail. The key to this call is to get the parents talking about their child(ren). Parents love to talk about their kids! Be sure to emphasize that their gift will directly help their child. When calling former parents, you will often get a response "call my son/daughter they are the alum." The best way to respond is by saying their support is helping future students have the Fairfield experience that their child had. Just keep these parents talking about their child's successes!

### **Athletics:**

A few times a year we will be calling athletes. For these calls you will be given talking points about the different teams. The key is to know the prospects team and then talk to them about how the team is doing this season. I will often give these pools to callers who are avid sports fans – this will make it easier to have conversations!

### **Specific Major/College:**

Throughout the year DSB/CAS/Nursing/Engineering schools often send out appeals to parents and alums from the different schools. During these calls you would be talking about the events/students of these different majors. I will try to match the callers major with the specific calling pools – this will make conversation flow easier. This is also a great way to learn more about how their education at Fairfield benefited them in their current careers...GREAT NETWORKING OPPORTUNITY!!!

**Stagmates:**

We often call this group around valentine's day. The key to this call is to ask them how they met, have they been on campus recently etc. The great thing about Stagmates is that even though the couple is making one gift, it counts as two donors (!!!!).

**Reunion:**

Every year Fairfield hosts Reunion Weekend, where alumni can come back and celebrate with their friends and family. For reunion calling, we call specific class years. The goal of calling is to get these alums excited, answer any questions and to ultimately get a reunion gift. Many donors will give larger gifts because it is their reunion year – so, try for that larger ask amount!



## Anatomy of a Call

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### 1. **Before the Call**

This is where you make yourself familiar with the prospect and their records.

### 2. **Introduction**

You need to introduce yourself and identify Fairfield as the reason you are calling.

### 3. **Updating Demographic Information**

You need to ask for home address, best phone number and email on every call so that we always have the most current information on all our alumni.

### 4. **Establish Rapport**

This is the part of the conversation where you need to focus on asking open-ended questions, using effective listening, and encouraging two-way dialogue.

### 5. **Reasons to Give**

Everyone decides to give back for different reasons. It is your job to learn what about Fairfield excites them and tailor your response to give towards those interests.

### 6. **Ask for the Pledge**

This is it, you have finally reached the main reason you are calling. This is the time where you have to be absolutely 100% confident.

### 7. **Objection Response**

The reality is that people are going to say no, in fact most of the time they are going to say no. Objection responses allow you to discover their reason for not initially agreeing to donate. With an objection you can negotiate a pledge that will work for them.

### 8. **Wrap-up the Call**

Before you hang up you need to double check with the prospect the amount of their gift and thank them again. Do not forget to mention a personal detail that you might have talked about in your conversation.

## Building Rapport

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### Getting Started

Building rapport can be one of the easiest or most difficult parts of your conversation depending on your experience and personality. We find that callers usually approach rapport – building in one of two ways

1. Ask a lot of open-ended detailed questions to get the prospect talking.
2. Talk about your own personal experiences at Fairfield

Both of these methods are acceptable – just find what works best for you. This will take some time and practice calls for you to find out. Some callers do very little rapport-building and find that the prospect appreciates the respect off their time. We do ask that you make an effort to engage the prospect in conversation, but feel free to do it quickly if you sense that the prospect is in a hurry.

***The most important thing to remember when building rapport is to reflect the tone and desires of the prospect as much as possible.*** If the prospect wants to reminisce about the old days at Fairfield, allow them to do so, but be sure to stay in control of the conversation. If the prospect does not have time to talk, move quickly through the rapport and on to the case for support.

Here are a few talking points for building rapport with Fairfield prospects:

- Current events happening on campus. This could be about the new Convocation Center being built or the men’s baseball team, or the new Residence Halls.
- Our national network of alumni is a source of great strength and provided a significant level of support to Fairfield University. Individual alumni gifts continue to be key factors in achieving our goals.
- Fairfield is achieving success in social – economic diversity – providing more access to students and families and fulfilling an important aspect of the University mission.
- The Fairfield spirit is rooted in Jesuit values such as involvement in a community, exploration of one’s talents and vocations, and reflection in the hopes of opening doors to an inspired life. Alumni support allows Fairfield to educate women and men who are not only proficient in their professions but enlightened with a spirit of service to create a more just world.
- Our legacy will be measured not only in buildings, endowments, and research opportunities, but in the value we provide to our students, our faculty, our community, our nation and to the global society of which we are part.

Refer to school – specific “fast facts” for additional talking points that are school specific.

Another important aspect of building rapport is asking leading questions. **ASK QUESTIONS YOU REALLY WANT TO KNOW THE ANSWERS TO!** Please use some of the following questions throughout your conversations...and then LISTEN to what they say!

- “How did you come to choose Fairfield?”

- “Tell me about some of your best experiences as a student at Fairfield.”
- “When were you last back on campus? What brought you here? How had things changed since you were a student?”
- “In what positive ways has Fairfield influenced your life?”
- “Do you keep in touch with friends from Fairfield?”
- “Which faculty/staff members impacted your life?”
- “How has your degree helped you in your career?”
- “Can you give me any advice as I start my career in the field of \_\_\_\_\_?”

**Another important matter to remember during rapport building is that you are a representative of Fairfield – sometimes the ONLY representative that a prospect will talk to in a given year.**

Please be as positive as possible without being dishonest. If you speak with a prospect that is very negative about the University, ask if there is anything you can pass along that would improve their feelings about Fairfield. Try not to take their negative opinions about the University personally.

Sometimes they will ask about your experience at Fairfield – it is important to share information but don't let the conversation veer too far from the task at hand!

### **Strategies for Building Rapport**

Building rapport means having conversation that leads to meaningful connections with alumni. Every call should include rapport at some point. Following the steps below will allow you to redirect the focus of the phone call away from a prospect's objection while developing a personalized persuasive reason to give.

### **Six Step for a Successful Rapport**

#### **1. Acknowledgement**

- General: “I understand your situation; we're just trying to get as many alumni involved as possible” ...
- Personal Reason: “That's understandable, and once again, congratulations on your (retirement).”
- Procrastination: “I'm glad to hear you're thinking about giving in the future.”

#### **2. Transition into Rapport**

- “One of the reasons I like calling alumni is that I get to hear about so many different Fairfield experiences, so I was just wondering...”

#### **3. Persuade**

- Ask 2-3 positive, open ended questions that focus on ONE topic.
- Sample Rapport Questions:
  - “...how do you usually keep up with what's happening on campus?”
  - “...how has your degree helped you in your career?”
  - “...were there any classes or activities on campus that had an impact on you?”
  - “...are you planning on attending reunion this year?” (If it's their reunion year)

#### **4. Summarize**

- Rapport focusing on the prospects positive statement



## 5. Transition out of Rapport

- "...in fact, that's why I'm calling..."
- "...it takes support to implement the change (you've suggested/noticed) on campus..."
- "...I am so glad you enjoyed your time at Fairfield, the final reason I am calling is to talk with you about the Fairfield Fund..."

## 6. Ask

- "...with this in mind, could you see yourself getting involved with a gift of \$250 in the future?"
- "With this in mind, can I count on your support of \$100?"
- "With this in mind, can I put you down for a gift of \$50?"
- "Would you be interested in making a gift of \$10 to Fairfield and skipping 2 trips to Starbucks this week?"

## The Importance of Effective Listening

Listening is a necessity in your job and in life. You do not have the luxury of face-to-face contact with non-verbal behaviors revealing the meaning of some messages. You have **one opportunity** and will need to focus your attention on what the prospect is saying and how s/he says it. Be sensitive to the tone of the conversation and keep it **positive**. Not only will good listening make the conversation go better, but the information gathered will be very beneficial as well.

There are two major areas in which you will listen:

1. Listen for clues about the prospect to help tailor the case for support
  - Did the alumni say s/he went through school on scholarship or financial aid? *Then press the idea that the funds may be used for student scholarships.*
  - Did the alum indicate s/he played a sport or follows athletics closely? *Then talk about the success of Fairfield teams, or ask questions about the alumni's involvement.*
  - Did the alumni indicate that they are unhappy with Fairfield? *Then ask about the issue, tell them you will forward it to the proper department, and write it in the comments section of Razors Edge.*
2. You must determine if the prospect is unwilling or unable to give the amount you have asked for. If they are unwilling, you should tailor your responses to common objections. You may gain a pledge by simply talking, developing rapport, and answering any questions/objections they have. On the other hand, if they are unable to give at that level, you should proceed to offsetting paying in installments and/or going to the next gift ask.

## Keys to Effective Listening

- Prepare in advance – Review the donors record before you call, then your mind is free to listen. Always be aware of what list you are on.
- Limit your own talking – You cannot talk and listen at the same time
- Don't interrupt a prospect – Be patient. Some people talk more slowly than others. A long pause does not always mean they are done talking.

- Take notes – Write any important comments the prospect makes. You may want to refer to it later in the conversation.
- Ask questions – If you do not understand what the prospect is saying, then ask them to explain. It shows that you are paying attention.
- Respond intelligently – Say congratulations if the prospect said they recently purchased a new house, or had a baby.
- Use listening responses – An occasional “yes, I understand” shows that you are still with the prospect and encourages them to keep talking.
- Listen for overtones – You can learn a great deal about a prospect from the way s/he expresses themselves and the way they react to what you say.

## Negotiation Cycle

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If at first you don't succeed try, try, try again! Every time a prospect says "no" to a dollar amount you will use the negotiation cycle to make the next ask. People don't give based on dollar amounts; they give based on reasons!

### Acknowledge the Objection

Show the alum you are actively listening and engaged to the call.

- Repeat/Rephrase the Objection
  - "I understand that..."
  - "it's certainly understandable that..."
  - "I can see how that may change your situation, but..."
  - "Congratulations on..."
- Ask a Questions
  - "What other nonprofits do you support?"
  - "Where do your kids go to college?"
  - Use the rapport sheet

### Deflect the Situation

Change their perspective; show them what a gift can support

- "Your gift can help support..."
- "Another thing I wanted to share with you is..."
- Giving more information from your script/share a personal Fairfield U story.

### Ask Again

Ask the prospect for a lower dollar amount; don't skip the ladder!

- "Knowing this, can we count on you for a smaller gift of \$\_\_\_\_?"
- "With that in mind, will you join fellow alumni with the most popular gift of \$\_\_\_\_\_?"



## Objection Responses

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### Welcome Objections!

#### "I'm Not Interested"

Inquire as to why they are not interested. Based on their response they might fall into a different objection response category.

*"Did you know that more than 80% of Fairfield students qualify for some form of financial aid, including grants, work-study positions, scholarships and loans? By supporting the Annual Fund this evening you are enabling the next generation of Fairfield graduates to reach their dream of a college education.*

*With this in mind could we count on your participation this year in the amount of \_\_\_\_\_?"*

You must:

- Be courteous
- Ask open-ended questions
- Ask why they do not want to give

**Remember, for every reason NOT TO GIVE, there is a more compelling reason TO GIVE.**

Once they tell you why, you can refer to this handy reference as a way to strategize how best to handle prospects issues.

#### Popular Reason Alumni Say "No"

- Financial/Fixed Income

*"I understand and certainly don't want you to make a pledge you are not comfortable with. Let me emphasize that it isn't the size of your gift that is important to Fairfield. By giving to the Fairfield Fund, you impact the academic mission of the University and demonstrate to the University that you care and understand the importance of giving back. Any amount would be greatly appreciated. Would \$\_\_\_\_\_ (3/4 of original ask) be a more comfortable amount for you?"*

- The amount I can give is so small it won't help very much

*"Every contribution to the Fairfield Fund is important and very much appreciated. Your pride in the institution shows by the fact that you're contributing, and that's what helps keep our program strong. Also, the alumni participation rate is an important indicator to corporations and foundations who look at the percentage of alumni and friends that support the University when considering Fairfield for major gifts and grants. So a gift from you tonight can help Fairfield secure tens of thousands of dollars in grant money tomorrow. Can we count on your support with a \$\_\_\_\_\_ pledge tonight?"*

- **Kids in College**

*“Wonderful! Where are they going? How do they like it? (listen, respond and ask more questions, if necessary.) Well, many of our alumni are in similar situations, but they still want to support Fairfield at a level that’s comfortable for them. Support of the Fairfield Fund keeps Fairfield affordable for those who may not be able to meet college costs on their own. Would \$\_\_\_\_\_ (3/4 original ask) be a more comfortable amount for you?”*

- **I Give Through the Mail Every Year/Why Are You Calling Me?**

*“As a student I really enjoy talking to you and thanking you for the ways you have helped make my experience at Fairfield great. If I can record a pledge for you today, I’ll send a confirmation in the mail and you can still send in your gift through the mail. Could we count on your support tonight with a pledge of \$\_\_\_\_\_?”*

- **Retired**

*“That’s great! What are you doing with your time? A number of our retired alumni are in similar situations, and although they might not be able to give as much as they might like, they still want to support Fairfield at a level that is comfortable for them. We’ve found installments are helpful for many people who are retired. Would a gift of \$\_\_\_\_\_ interest you? Made in installments, that gift would be \$\_\_\_\_\_ every month?”*

- **I Already Gave**

First clarify when the gift was given (month and year) and where the support was directed. (Was it given to the Lacrosse Team or another organization on campus and thank them for supporting the University)

**If the gift was given BEFORE July 1, 2021**

*“I realize you gave a gift recently, and I’m so grateful for your support of Fairfield. Here at Fairfield, our fiscal year starts on July 1, so any gifts given before that date are considered last year’s gifts. I’m calling tonight to ask for a gift to this year’s Fairfield Fund which will run through the end of June 2022. Can we count on you again this year with a gift of \$\_\_\_\_\_?”*

**If their gift WAS given AFTER July 1, 2021**

*“I’m very sorry, sometimes our solicitation efforts overlap or cross in the mail. Thank you so much for supporting the Fairfield Fund!”*

- **Bought a House/Car/Just Married/New Baby**

*“Congratulations on your new addition! (Is this your first house? What kind of car did you get? Did you have a boy or a girl?) I would like to stress how much individual gifts impact the quality of education at Fairfield. For example, corporations and foundations look at the percentage of alumni and friends that support the University when considering Fairfield for major gifts and grants. So a gift from you can help Fairfield secure tens of thousands of dollars in grant money. Can I count on your support with a gift of \$\_\_\_\_\_ (3/4 of original ask)?”*

- **Want to think it over/Can’t Commit to Specific Amount**

*"I can understand how you might need some more time to consider that gift. I'm glad you're interested in supporting the Fairfield Fund! I'd just like to mention that we are trying to meet our nightly goal of \_\_\_\_\_ gifts/dollars. Is there an amount you would be comfortable with, it is non-binding and you can change it at any time? Is \$\_\_\_\_\_ (3/4 of original ask) an amount you would feel comfortable with?"*

- **Bad Experience at Fairfield/Dislike Fairfield**

*"I'm sorry to hear that. One of the important benefits of calling alumni is to identify their feelings regarding Fairfield. If you could tell me a little more about your concerns, I would be happy to refer your comments to an appropriate University office to see if they can help."*

- **Give Elsewhere**

*"It's nice to hear that our alumni are generous enough to support other organizations. Sometimes people do not realize that individual contributions for the Fairfield Fund are not limited to scholarship support and academic programs. In fact, many alumni and friends allocate their funds to areas that promote medical research and international service. What types of organizations do you support?"*

*(Listen, respond, and make suggestions for similar allocations at Fairfield.) With that in mind could we count your support tonight with a gift of \$\_\_\_\_\_ to \_\_\_\_\_?*

- **My Child Was Not Accepted to Fairfield**

*"I'm sorry that happened, and I understand your disappointment. Was there a particular experience you had with the University during the admission process that you felt could have been more positive? I'll relay your concerns to the appropriate office. I hope you'll still be willing to consider a pledge to your alma mater. Can I count on you for a pledge of \$\_\_\_\_\_ tonight?"*

- **I put Fairfield in my Will**

*"Thank you so much! Many generations of students will benefit from your generosity. Can I send you any further information about this important gift or do you already have everything you need?" (Regardless of response, please indicate prospect's interest in comments.)*

- **Alumnae is Deceased**

Express condolences for their loss and tell the person on the phone that you will update Fairfield's records. Ask if they want to continue to receive phone calls from the Fairfield Fund – you will be surprised because some spouses of alumni will continue to give and will want to continue to receive information from the University. Please make a note of who you spoke with and their response in the comments section of Razors Edge.

- **If it's younger alumni**

- Stress participation
- Emphasize with their financial situation – if applicable.

*"I understand that it might be difficult for you to get involved this year, especially since you just graduated recently and probably have a lot going on in your life right now. The reason we call young alumni like you is that you can provide more up-to-date insight as to what could be improved on campus. The strength of*

*this campus has a lot of impact on your degree's reputation and marketability. That's why a lot of our newest alumni are getting involved with a gift of \$\_\_\_\_\_. How does that sound to you?"*

### **General Tips for Dealing with Objections**

- Do your best not to lose control of the conversation. As soon as you lose control, you've lost the pledge.
- Don't reply too quickly to common objections – ACTIVELY LISTEN to everything the prospect has to say and don't interrupt the prospect.
- Emphasize with the prospect by acknowledging their concerns and transitioning into an appropriate response and try not to have long gaps in the conversation. It will let them think of more reasons not to give.
- Respond to WHAT the prospect is saying, not HOW they are saying it.
- Don't take it personally!
- Objections regarding the amount of the pledge can be negotiated using payment options – only after using payment options should you drop the amount. Never say amount is TOO MUCH or A LOT OF MONEY.
- Emphasize participation
- Utilize the weekly challenges, emphasize to the prospects that they are a part of our success.
- Stress the fiscal year and that gifts are not due until June 30.



## Making the Ask

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The NUMBER ONE reason people give to philanthropic organizations and non-profits like Fairfield is **because they were asked**. Never be ashamed or feel embarrassed about asking people to support a good cause! Be assertive and be proud that you are raising money for Fairfield.

### Tips/hints and good technique:

When making your “ask”, there are a LOT of things to remember. Keep the following requirements in mind as you transition into your ask:

- Always preface any “ask” with reasons to give, preferably reasons that are personally applicable to the Alum.
- Always thank an Alum for their previous support before the “ask”.
- Always start high (more than double if your conversation is going well) – you can negotiate a lower pledge if necessary, but you cannot ask for more than what you asked the first time.
- Remind the prospects that they have until June 30 to pay off any pledge, that their gift to Fairfield is tax deductible, and they can allocate their pledge to the school or area of study that they choose...all good reasons to donate!
- Use the 3 Ask Rule!

**What is the 3 Ask Rule?** – When making the ask there is the potential for your first ask amount to be refused. Here are the steps to take in order to turn that refusal into a gift!

1. The first ask should be the **ASK AMOUNT** that is listed in Razors Edge.
  2. If they say no to this ask, move on by asking them for **an amount they feel comfortable with**. Mention how much their gift would mean to you as a student or go into detail on an area the money would help.
  3. If they refuse the second ask, go for the **CLASS ASK** (example: \$20.21 for Class of 2021). This is a great way to make a memorable gift in honor of their class year or classmates.
- Credit Card pledges mean instant money for Fairfield and \$1.00 bonus for you – ask the prospect every time!  
*“Thank you for your generous donation. Can I put that on your Visa, MasterCard, or American Express this evening...”*

**What is a Matching Gift Company?** – Many organizations encourage their employees to make charitable contributions. In order to encourage philanthropy, these companies will match any giving that their employees make to an organization. All the alum needs to do is take the pledge form to their Human Resources department and fill out a form. Matching gifts are essentially free money for Fairfield!



### **Advanced Caller Advice on making The Ask:**

- Remember that most alumni know that you are calling to ask for money the second you introduce yourself. Take this into consideration when making your ask and going through the rest of your script.
- If they have given in the past, let them know how much you appreciate their past generosity. Say thank you right away!
- Don't take too long to make your ask. We do not want prospects to stop paying attention to you during the ask (which can happen if the ask is particularly long.) Give a few brief reasons to give and then assertively make the ask. Non-donors may require a longer explanation of what the Fairfield Fund is and why it is important.
- Be confident! If your voice sounds timid, or you present the ask as a question, the alum will sense your hesitation and may be more likely to say no. Make a statement!

Which of the following sounds better?

*Mr. Smith, could you maybe make a gift of \$250 tonight?"*

OR

*Mr. Smith, you have been a generous donor in the past I just want to thank you for your support. I'd love to count on your support again this year with a gift of \$250. Would you like me to put that your Visa, MasterCard, or American express tonight?*



## Transitions

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Transitions are very important to the call because they keep the conversation flowing towards the ask, help the caller keep control of the conversation and make the phone call seem more natural and less awkward. BE SMOOTH!!!

### Tips for Good Technique:

- **If the prospect has NOT given in the past:**  
*"In the past, many of Fairfield's alumni have made it possible for thousands of students to attend Fairfield University. I'm personally thankful that these people have provided the means for students like me to receive a quality, value-based education at Fairfield."*
- **If the prospect has given in the past:**  
*"Through your past gifts to The Fairfield Fund, you have supported Fairfield's mission and helped pass along a value-based education to thousands of students like me. I want to personally thank you for your support."*
- **Here are some good transitional phrases to move from rapport to your ask:**
  - *All of these things could have not been accomplished without support of our alumni...*
  - *Keeping that in mind...*
  - *Because alumni support is vital to our success...*
  - *If it wasn't for the generous support of our alumni...*
  - *Without your help...*
  - *Since you have been such a generous donor in the past...*
  - *Keeping in mind all of these great things we just talked about, and the fact that you have until June 30 to pay off any pledge you make... (You can also mention payment plans!)*
  - *We would like to invite you to continue your support of Fairfield tonight...*
  - *Can I count on your participation tonight with a gift of \$\_\_\_\_\_...*

Transitions are also good to use after an objection. They help you regain control of the conversation and take the alumni's mind off their "no."

- **Here are some good transitional phrases to use after an objection**
  - *I can certainly understand your hesitation...keep in mind...*
  - *Now more than ever Fairfield is looking toward its alumni for support...*
  - *Would \$\_\_\_\_\_ be more comfortable amount for you tonight...*
  - *We are very goal-oriented and would like to be as specific as possible. Would it be okay if we decided on a minimum gift tonight of...*

Don't just reply "Well, how about \$100 instead." This is not an auction, it's a pledge. GIVE the prospect a reason to give a donation with every ask you do.

**Advanced Caller Advice on Transitions:**

- Transitions can help you keep control of the call. They also help you make the call flow smoothly.
- Don't hesitate with transitions, especially during an objection response.
- Develop transitions that you can use every time and are comfortable with.
- It is best if you can incorporate your rapport into reason. For instance, if you talked about Fairfield technology, let them know that many of our technological expenses are paid for by money raised through The Fairfield Fund. This makes each ask personal and unique to the prospect you are talking to...and makes you seem less like you're reading from a script!

## Unspecified Pledge

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### What is an unspecified pledge?

- An unspecified pledge is when a prospect does not commit to a \$ amount over the phone, and asks you to send them something in the mail (i.e. more info, pledge card, etc.)
- Also known as... “Considering”
- Commonly heard: “Just send me something in the mail” “I want to think about it more” “I have to look at my finances” “I have to talk to my spouse first” “I don’t give money over the phone”

### Why do we want to reduce the number of unspecified pledges?

- “Considering” is the nice way of saying NO! They don’t want to commit and/or be rude, but want to get you off the phone.
- Those who ask you to “send them something in the mail” most often never send in a donation! – This means we lose them when we hang up the phone! \*Especially non-donors
- Individuals with unspecified pledges do not receive monthly reminders! They only receive a one-time note from us and never hear from us again this fiscal year. If they don’t pledge a \$ amount, we can’t remind them to make a donation.

### How can we reduce the number of unspecified pledges?

- EDUCATE THEM!
- As a student caller, your job is to make a case & convince them to give an amount now!
- Use Base Amount/Participation Technique (during the 3<sup>rd</sup> ask):
  - Assume the prospect is interested in giving
  - Emphasize participation at any gift amount level!
  - Get the prospect to commit to an amount they feel comfortable with. Individuals who commit to a base amount are MUCH MORE likely to donate in the future than individuals with an unspecified pledge.
- Tell them about our goals & how we like to know how much we raise each night
- Don’t always ask “can I put you down for a base amount tonight? ... SUGGEST a small \$ amount to them instead!
- Give them a reason WHY we need a base amount – goals, budget-planning, etc.

### Use These Rebuttals:

- I have to look at my finances/I’m not sure how much I want to give yet

*"I definitely understand. What can we do for you this evening is put you down for a base amount of \$\_\_\_\_, something that you're definitely comfortable with, and if you wanted to increase that gift after you receive the card, that would be great. Otherwise your participation at that level is greatly appreciated and needed. Can you commit to the gift of \$\_\_\_\_ tonight?"*

*"I can understand how you might need some more time considering that gift. I'm glad you're interested in supporting the Fairfield Fund! Our goal tonight is \_\_\_\_\_ donor/gifts. Can we count you towards our goal tonight with an amount that you would feel comfortable with?"*

*"In order for us to provide maximum benefit to Fairfield, we like to have an idea of how much support will be available for planning and budgeting purposes. This allows us to address the immediate needs on campus. Since I have the opportunity to speak with you personally, I hope that we can determine a moderate amount that is comfortable for you. Once you receive the card in the mail, you may increase the gift or keep it at the amount that you've specified. Regardless, we will be grateful for your support and participation. Considering how valuable your support is to the entire Fairfield community, can I count you down for a base amount of \$\_\_\_\_?"*

- **I have to speak with my spouse first/My spouse handles all the donations**

*"I understand you would like to speak with your spouse first. Can I call you back later tonight/at another time after you've had the chance to speak with him/her?"*

*"Thank you for your interest in the Fairfield Fund! I can understand that you would like to speak with your husband/wife. I can put you down for a base amount tonight, something that you're comfortable with and if you choose, you can increase the amount after you receive the mail. Otherwise, your commitment at that level is greatly appreciated. Can we put you down for a base pledge of \$\_\_\_\_ tonight?"*



## Restricted Gifts & Designations

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### What is a restricted gift?

A restricted gift is \$\$ restricted to an area (e.g. to benefit an athletic team, scholarship, department, particular program etc.)

### What is a designation?

Each pledge/gift is required to have a DESIGNATION, whether it is to the Fairfield Fund or to a “restricted” program (e.g. Men’s Lacrosse)

### Why is this different than a gift to the Fairfield Fund?

A gift to the Fairfield Fund is Unrestricted and given to either

- The area of greatest need
- Financial Aid
- Student Life/career services

### When do we call people who give restricted gifts?

People who regularly donate to a restricted designation are in separate calling segments and appear with the code “RSTR” or simply say “LYBUNT restricted”. However, some individuals who are not in these groups may also make restricted gifts.

### How do I enter a restricted gift on Razors Edge?

You speak with a prospect who tells you they would like to make a \$50 pledge to the Multicultural Scholarship...

1. Follow the instructions on how to enter a call outcome. You would want to enter this call outcome as a pledge.
2. In the comments section put “\$50, designation: multicultural scholarship”
3. If you send something in the mail put the designation in the thank you note. Do the same for an email. Remind the prospect to either select the proper designation online or put it in the comments on venmo.

## Razors Edge Outcomes

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### What to do after the call

Once you have finished the call go down to custom fields section of the prospects profile and click the “add” button. After you click “add” scroll back to the top to finish filling out the form. Under the category drop down click “Phonathon”.

Under the “value” drop down you will see 8 options. Based on the call, decide which one is best.

- **Callback:** Click this option if the prospect does not have time to talk and asks to be called back. Under the date section, select the date you called them.
- **Left Message:** Click this option if no one answered and you left a message. In the date section put the date you made the call.
- **Online Gift/Venmo:** Click this option if the prospect says they will make a gift online or via venmo. Be sure to put the \$\$ amount in the comments section as well as the date you talked to the prospect.

The screenshot shows a mobile application interface for adding a custom field. At the top, there are navigation arrows, a 'View record' button, and a close button. The main form is titled 'Add custom field for Dana Ajello 1989'. It contains the following fields: 'Category' with a dropdown menu set to 'Phonathon'; 'Value' with a dropdown menu set to 'Online Gift/Venmo'; 'Date' with a text input '02/10/2021' and a calendar icon; and 'Comment' with a text input containing '\$25'. At the bottom of the form are 'Save' and 'Cancel' buttons. Below the form, a 'Constituent summary' section is partially visible.

- **Pledge:** Click this option if the prospect makes a specified pledge. Be sure to put the \$\$ amount in the comments section as well as the date you talked to the prospect.
- **Refusal:** Click this option if they refuse to give. Be sure to put any relevant information from the prospect in the comments section (Why they don't want to give, If they are angry/upset etc.) Don't forget to put the date you contacted them.

- **Thank you Call:** If you are completing thank you calling please click this option once you thanked a prospect. Be sure to click the date you thanked them.
- **Unspecified Pledge:** Click this option if the prospect says they will consider giving a gift. Put any relevant information from the call in the comments section.
- **Update:** If you get a prospect who has updated contact information, click this option. When you get someone who has an update you will also have another outcome of the call (refusal, pledge, online gift/venmo or callback). After you complete the update outcome, click “add” again and do a second input for (refusal, pledge, online gift/venmo or callback). Follow the outcomes above for the second input.

The image shows a screenshot of a CRM interface. At the top, there is a header bar with a 'View record' button, a close icon (X), and a help icon (question mark). Below this is a modal window titled 'Add custom field for Dana Ajello 1989'. The form contains the following fields:

- Category \***: A dropdown menu with 'Phonathon' selected.
- Value**: A dropdown menu with 'Update' selected.
- Date**: A text input field containing '02/10/2021' and a calendar icon to its right.
- Comment**: A text input field containing '900 Fairfield Beach Road, Fairfield CT 068'.

At the bottom of the modal, there are two buttons: 'Save' (in blue) and 'Cancel'. Below the modal, the text 'Constituent summary' is visible, along with a grid icon and a dropdown arrow.





**Writing a Thank You Note**

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There are 4 situations in which you would write a note:

1. If a prospect made a specified pledge
2. If a prospect made a gift online/venmo/credit card
3. If a prospect made an unspecified pledge/is considering donating
4. If a prospect did not give, but you had a nice conversation – A personal note from you might change their mind!

Each note should include

**A) Salutation**

- a. Informal: “Dear Emily” (Used only for Young Alumni)
- b. Formal: “Dear Mr./Mrs.” (Everyone else)

**B) Thank you!!!**

- a. Pledge/Gift: “Thank you for your pledge/gift of \$\_\_\_\_\_ to the Fairfield Fund”
  - i. Always include AMOUNT of pledge/gift
- b. Considering: “Thank you for your consideration in donating to the Fairfield Fund”
- c. Nice Conversation: “Thank you for taking the time to speak with me on the phone”

**C) Reiteration of how important their donation is to Fairfield/you/all students**

- a. Explain what their gift is benefiting (i.e. financial aid, study abroad etc.)
- b. Mention the Fairfield Fund (If they donated to something specific like soccer, mention that instead)
- c. Express how much their donation benefits YOU!

**D) Something Personal from conversations**

- a. “I’m glad you’ve been back to visit campus recently”
- b. “I hope your son continues to enjoy his time here at Fairfield”
- c. “Congratulations on the new job”
- d. Sign the note with your name & year
  - i. Marissa ‘20
    1. You do not need to include your last name!

<u>Do’s</u>	<u>Don’ts</u>
Write Neatly & Legibly Make it Personal Show Appreciation Write Big Enough to Read	Cross – Outs White – Outs Misspellings Red Pen Wet or Dirty Notes

For the thank you message you can send one via mail or email, depending on what the prospect requests.

What to include in the mailing:

- **Specified Pledge:** Thank you card, pledge card (fill out Name, Address and ID # in the bottom left corner), Business Return Envelope and then a normal size envelope.
- **Online Gift/Venmo/Credit Card:** Thank you card and normal size envelope.
- **Unspecified pledge:** Thank you card, pledge card (fill out Name, Address and ID # in the bottom left corner), Business Return Envelope and then a normal size envelope.

### Online Gift/Venmo/Credit Card

Dear Mrs. Smith

Thank you so much for your gift of [\$25] to the Fairfield Fund. Your support is greatly appreciated.

*(Mention something personal about the call)*

I wish your son the best of luck in his college search and I hope to see another Fairfield legacy!

(End with an event coming soon/or inviting them back to campus)

We hope you can come to campus for Alumni & Family Weekend Oct 24 & 25<sup>th</sup>. You can go to [www.fairfield.edu/alumni](http://www.fairfield.edu/alumni) to see the schedule for the weekend. Thank you again for your support!

All the best,

Marissa '20

### Specified Pledge

Dear Mrs. Smith

Thank you so much for your pledge of [\$25] to the Fairfield Fund. Your support is greatly appreciated.

*(Mention something personal about the call)*

I wish your son the best of luck in his college search and I hope to see another Fairfield legacy!

(End with an event coming soon/or inviting them back to campus)

We hope you can come to campus for Alumni & Family Weekend Oct 24 & 25<sup>th</sup>. You can go to [www.fairfield.edu/alumni](http://www.fairfield.edu/alumni) to see the schedule for the weekend. Thank you again for your support!

All the best,

Marissa '20

## Unspecified Pledge

Dear Mrs. Smith

Thank you so much for considering a gift to Fairfield. As a current student, I can't tell you how much it means to have the opportunity to speak to alumni working in the professional world. It really helps to connect the dots from my work at Fairfield to the "real world"

Please keep in mind that your gift to the Fairfield Fund will help to continue to attract great faculty and help expand the curriculum here at Fairfield

*(Mention something personal about the call)*

I wish your son the best of luck in his college search and I hope to see another Fairfield legacy!

All the best,

Marissa '20



## Reasons to Give

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### Why Should People Give to the Fairfield Fund?

In order for you to successfully secure Phonathon pledges for the University, you need to understand and believe in why it is important for people to give to the Fairfield Fund.

Gifts for the Fairfield Fund are unrestricted, and provide immediate critical funding for the University's area of most need and daily operations.

- **Tuition and fees do not cover the full cost of an education at Fairfield.** In fact, each student's tuition and fees only cover approximately 80% of what it costs for that student to attend Fairfield. The Fairfield Fund helps make up that additional 20% that is needed to pay for each student's educational experience at Fairfield.
- **The Fairfield Fund provides students with opportunities.** Thanks to the Fairfield Fund, students have the opportunities to have tutors, utilize Fairfield's alumni network for internships, go abroad with the Study Abroad program or enhance their education through a research opportunity and the learning and writing centers.
- **Strengthens the value of your degree and those of our alums.** Alumni satisfaction is used by U.S. News and World Report in its determination of the top universities. Participation in the Fairfield Fund is the sole basis for determining alumni satisfaction. By making a gift and alum is giving their stamp of approval on a great Fairfield education.
- **The Fairfield Fund supports faculty recruitment and retention.** The Fairfield Fund allows Fairfield to recruit and retain top-notch faculty from all over the world and it allows Fairfield to keep the student to faculty ratio 12:1, which gives professors the time to engage and connect with students on a personal level.
- **Every gift helps.** Alumni's giving affects our ability to raise money from corporations AND it affects our rankings in national publications such as the U.S News and World Report. Even if alumni cannot give on a large scale, the fact that they are participating in the Fairfield Fund will benefit the University in many ways.
- **The University has the flexibility to apply funds where they are needed.** Unrestricted gifts provide the necessary flexibility to bring the most immediate impact to the University.
- **Fairfield Provides a mission that many people believe in.** The Fairfield Fund provides an environment for faith in action – for one another, the community and the greater world.
- **Alumni benefited from the Fairfield Fund when they were students.** We are asking that Fairfield's alumni return the favor by supporting the Annual Fund today. Reference any activity that the Fairfield Fund supports that they might have mentioned during the rapport.

## STRATEGIZE YOUR REASONS!

### Financial Crisis

For prospects who view a potential gift to Fairfield as a primarily a financial endeavor, it would be best to appeal to them with financial information. Such statistics as tuition only covers 80% of the cost to educate a student or the fact that it eliminates higher percentage tuition increases may appeal more to the financial minded prospects. The U.S. News and World Report Rankings are a great way to let them know how far their dollars go as well.

### Emotional

This category would consist of reasons to give which inspired feelings of nostalgia or appeal to a prospects ego. This category would be great for those “remember when” sort of reasons to give which remind prospects of their time they spent at Fairfield. Reasons to give such as having the same class, professor, or residence hall could fit well into this category. Additionally, this category could be used for those who are recognition/reputation minded alumni. Using reasons to give such as donor recognition levels or one-upmanship among classmates or friends could engage prospects who respond well to ego-based appeals.

### Academic

Prospects whose primary focus is the academic reputation of the University would respond well to this category. Statistics such as the academic prominence of incoming freshmen classes or research breakthroughs may find their home in this category. Using the reason of continued value to their Fairfield degree could fit well in this category, or equally well in the financial.



## Stags for Stags

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### What is Stags for Stags?

Stags for Stags was created to help students, families and friends who have been impacted by the coronavirus pandemic. Stags for Stags, is a response to urgent and critical student needs. These needs include:

- **The Financial Aid & Scholarship and Multicultural Scholarship Fund.** Providing essential resources for students to begin or continue their Fairfield education. Gifts to the Financial Aid & Scholarship Fund help students overcome financial burdens, including those with unanticipated needs they face as a result of the pandemic. The Multicultural Scholarship Fund amplifies access and inclusion for the students of color through immediate-use scholarship.
  - The Impact: 175+ students have received an additional need-based grants over the past year. \$3,700 is the average amount for each grant.
- **Student Wellness & Resiliency Fund.** The fund directly supports the response to students in crisis and increase capacity to care for students' physical and mental health through outreach and counselling innovations.
- **Academic Response & Preparedness.** Helps to ensure student have access to online learning and technology that will complement their classroom education and new learning modalities.
- **Campus Spirituality & Student Guidance.** Enhances the University's response to the students' spiritual necessities by supporting a variety of programming that focuses on reflection, incorporating God into daily life, and learning more about the Ignition Pilgrimage.



## Thank You Calling Script

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### If the person picks up the phone...

1. *"Good evening, may I please speak to [PROSPECTS NAME?]?"*
  - a. If YA – you can ask for them by their first name
  - b. If General Alumni – you ask for them by their formal salutation (i.e. Mr. Smith)
  - c. If Parent/Alum Couple – you ask for both/either of them (i.e Mr. or Mrs. Smith)
2. *"My name is [YOUR NAME] and I am a student calling from Fairfield University. I am calling to personally thank you for your recent gift to [DESIGNATION]"*
  - a. **Fairfield Fund/Scholarship:** *"Your generous support enables our university to provide quality education at an affordable price for students like myself. Gifts from alumni, parents and friends also provides support for scholarships, new facilities, enhances academic program, and creates a wonderful experience for Fairfield students."*
  - b. **Quick Center:** *"The programs at the Q not only enrich my student experience, but the greater community as well."*
  - c. **Athletics:** *"Just ask any coach or student-athlete and they will tell you that competing at their highest level takes hard work, discipline, and lots of support. Your generosity is vital to the success of all student athletes."*

\*If you're not sure about the designation, just say "recent gift to Fairfield University..." & use the 1<sup>st</sup> answer

3. Do you have any questions for me?
4. *"Once again, I want to thank you so much for your support and I hope you have a wonderful evening."*

### Voicemail – If the person does not answer the phone

Leave an answering machine message! You only have to try 1 number and then leave a message!

*"Good evening, my name is [YOUR NAME] and I am a student calling from Fairfield University. I want to personally thank you for your recent gift to the [DESIGNATION]. Generous support from alumni, parents, and friends is vital to the success of Fairfield students, like me. Your support truly makes a difference every day. Thank you so much again and have a great evening!"*



## Pledge Reminder Calling

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The goal of these calls is to remind people to fulfill their pledge. Please do not leave a \$\$ amount with anyone but the person who made the pledge. Please leave a voicemail. The last column in the file is for your comments. Please put the following; (Left Voicemail, talked with person, already fulfilled.) If they have specifics that you feel is important please put in the comments. After you finish going through the file, please email it back to me.

### Script:

Hello, is [PROSPECT NAME] available. My name is [YOUR NAME] calling from Fairfield University. I am just reminding you that you have a unfulfilled pledge of [\$\$\$\$\$]. You can fulfill your pledge online at [www.fairfield.edu/give](http://www.fairfield.edu/give) or via venmo @Fairfield-UniversityGiveAGift

Do you have any questions for me?

Thank you and have a nice day!

### Voicemail:

Hello! This voicemail is for [PROSPECTS NAME]. This is [YOUR NAME] a student calling from Fairfield University. I am calling to remind you about your unfulfilled pledge. You can go to [www.fairfield.edu/give](http://www.fairfield.edu/give) to make your gift. Your support is greatly appreciated! Thank you and have a great day!





**Reunion Information**

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**Rescheduled 2020 Reunion:**

- September 18, 2021
- [www.fairfield.edu/reunion](http://www.fairfield.edu/reunion)

5 <sup>th</sup> – 2015	20 <sup>th</sup> – 2000	35 <sup>th</sup> – 1985
10 <sup>th</sup> – 2010	25 <sup>th</sup> – 1995	40 <sup>th</sup> – 1980
15 <sup>th</sup> – 2005	30 <sup>th</sup> – 1990	45 <sup>th</sup> – 1975

**Rescheduled 2021 Reunion:**

- October 2, 2021
- [www.fairfield.edu/reunion2021](http://www.fairfield.edu/reunion2021)

5 <sup>th</sup> – 2016	20 <sup>th</sup> – 2001	35 <sup>th</sup> – 1986
10 <sup>th</sup> – 2011	25 <sup>th</sup> – 1996	40 <sup>th</sup> – 1981
15 <sup>th</sup> – 2006	30 <sup>th</sup> – 1991	45 <sup>th</sup> – 1976

**Schedule for both Reunions:**

5:30pm – Reunion Mass  
 6:30pm – 25<sup>th</sup> Reunion Toast and Class Photo  
 6:30 pm – Bellarmine Lawn Dinner Dance

**2020 Reunion Pricing**

Event	Register by 5pm on 9/9	Register by 5pm on 9/23
Reunion Mass	FREE	FREE
25 <sup>th</sup> Reunion Toast	FREE	FREE
Dinner Dance	\$80	\$100

**2021 Reunion Pricing**

Event	Register by 5pm on 9/9	Register by 5pm on 9/23
Reunion Mass	FREE	FREE
25 <sup>th</sup> Reunion Toast	FREE	FREE
Dinner Dance	\$80	\$100

**Incentive:**

In an effort to help boost APR before fiscal year-end, everyone who registers by June 30<sup>th</sup> 2021 will be entered into a drawing and we will randomly select 10 names (from each of the reunions) to receive a refund of the cost of their dinner ticket.

**Refunds:**

The deadline for refunds is September 9 at 5 p.m. EST for 2020 Reunion and September 23 at 5 p.m. EST for 2021 Reunion. This coincides with the price change dates listed above.

**Housing:**

As a result of Reunion being held during the academic year, all on-campus housing will be occupied by residential students. Therefore, **we cannot provide on-campus housing** accommodations to our alumni and guests and instead are arranging room blocks at several area hotels. This information will be listed on the website.

**Reunion Giving:**

For both Reunions, there is a pre-populated \$5 gift amount in the Reunion Gift section. This amount can be increased or decreased, or deleted if someone really does not want to give. If they don't want to give, the gift field **MUST** be cleared for them to be able to move on. If they just type in a zero, they'll get an error message when they try to move on to the next page.

*\*For more Questions go to the FAQ section on the website.*

**Making the Call:**

When making a call to a reunion year you will handle the call the same way you would handle any normal call – except, you can mention reunion. It is important that you talk about getting them to register and making a gift in honor of their reunion year. Be sure to answer the questions as best as you can. If you don't know an answer direct them to the website. Don't forget to familiarize yourself with pricing, schedule and FAQs.



## Fast Facts About Fairfield

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### University Facts

- Founded: 1942
- President: Dr. Marc R. Nemecek, PhD
- Only Jesuit university in CT and 1 of 28 nationwide
- 200-acre campus
- 1-hour train ride from NYC.

### Students:

- 4000 Undergraduates
- 12:1 Student to Faculty Ratio
- Average Class Size: 20
- 30% Receiving Academic Scholarship
- 90% Receiving Financial Assistance
- 90% Retention Rate
- The student body represents 37 states and 50 countries
- 98% of the Class of 2019 secured full-time professional employment, admission to graduate programs, or participation in volunteer service program.

### Academics:

- 48 Undergraduate Majors
- 24 Interdisciplinary Minors
- 60+ Student Abroad Programs
- 41.1% of graduates obtained employment through Fairfield University resources and campus recruiting.

### Athletics:

- NCAA Division 1 Varsity Programs: 20
- Overall MAAC Tournament Championships: 62
- Overall NCAA Tournament Appearances: 47
- MAAC Regular Season Championships: 70
- Student Athlete Graduation Rate: 97%
- 2017-18 MAAC Championships: Men's Soccer, Field Hockey, Volleyball, Women's Swimming & Diving, Women's Lacrosse

- Seven teams earned 2018 NCAA Public Recognition Award
- 187 Fairfield student-athlete's names to the 2016 MAAC Academic Honor Roll

Faculty:

- 300 full-time faculty
- 345 part-time faculty
- 92% hold the highest degree in their field

## Gift Societies

### Above President's Circle Giving Societies

Cornerstone Club	\$25,000+
Chairman's Club	\$10,000 - \$24,999
Founder's Club	\$5,000 - \$9,999
1942 Society	\$2,500 - \$4,999
President's Circle (PC) Member	\$1,000 - \$2,499



*\*Presidents Circle members are invited to special events throughout the year, such as the President's Christmas party and regional Circle cocktail receptions. They are also recognized in a special Honor Roll of Donors.*

### Under President's Circle Giving Societies

Loyola Companions	\$500 - \$999
Xavier Associates	\$250 - \$499
Fairfield Fellows	\$125 - \$249

### Young Alumni Giving Society – GOLD Circle (Graduates Of the Last Decade)

The Gold Circle is a special leadership association of young alumni committed to Fairfield for the long term. You can join The GOLD Circle by making gifts that increase by \$100 for each year after graduation. Benefits include; receptions with the President and invitations to special events, rewards, recognition in University publications, and more!

<b>2021</b> - \$100	<b>2017</b> - \$500 ( <i>5<sup>th</sup> Reunion</i> )	<b>2013</b> - \$900
<b>2020</b> - \$200	<b>2016</b> - \$600	<b>2012</b> - \$1,000 ( <i>10<sup>th</sup> Reunion</i> )
<b>2019</b> - \$300	<b>2015</b> - \$700	
<b>2018</b> - \$400	<b>2014</b> - \$800	

### Young Alumni Giving Society – Fairfield Forever

This Young Alumni program is about consecutive giving each year and developing the "habit" of philanthropy. To show appreciation to our most loyal donors, those young alumni who make a gift each year from graduation through their 5<sup>th</sup> Reunion become members of Fairfield Forever and receive: free admission to their class's Friday Night Reception during their 5<sup>th</sup> Reunion Weekend and a free "Fairfield swag" gift.



## Fairfield University Alumni of Color Network

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### Mission Statement

The Fairfield University Alumni of Color Network is an official affiliate group of the Office of Alumni Relations that serves to create a community and gateway to support Black, Indigenous, People of Color (BIPOC) Stags during and after their time at Fairfield.

The network will host a variety of educational, professional, and social programs that cultivate personal and professional connections and opportunities to support the University while demonstrating the strength and success that exists with the BIPOC community.

### Goals

- **Advance** volunteerism, pride, and philanthropy
- **Connect/Network** with other alumni, current students, and the University community
- **Build** community through partnerships
- **Mentor** students and alumni of color
- **Recruit** alumni to join and actively participate in activities off the network.



## Miscellaneous Issues

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### National/State “Do Not Call” Registry

Many states have implemented a “do not call” registry where people can put their name on a list of households that are not to be contacted by “telemarketers.” Again, the important thing to remember is that we are **NOT TELEMARKETS**. We have checked with our legal counsel, and these registries and lists do not apply to places like Fairfield. If a prospect claims that they are on some sort of list that should keep them from calls, please tell them this:

*“I’m sorry to have bothered you and I understand what you’re saying. Inclusion on these types of lists does not keep you from being called by places like Fairfield where you are a part of a constituency. In order to be excluded from Fairfield’s calls, you would need to be added to our own “do not call” list. We value our ability to stay in touch with you and this is the best way to do it. I just need a few minutes of your time to update our records and to talk with you about the Fairfield Fund.”*

Adding a prospect to our “do not call” list should never be offered. If a prospect requests it, we can add them to our own “do not call” list. Code this call as a refusal and then put “do not call” in the comments box. Be sure to add any additional information that you feel is relevant.

### Campus Issues

At times, a prospect will bring up a recent event or campus issue and ask you what you know or think about it. While we want you to share your personal experiences with prospects, this is not an opportunity for you to share your opinion about potentially sensitive university issues. Example of these types of issues include tuition increases, controversial theatre presentations, war demonstrations or religious/political discussions. It is imperative that you NOT provide personal commentary on any of these issues. If a prospect brings something up, an appropriate response is:

*“I understand your concerns about this issue. As a student, I really can’t provide any insight or information regarding this topic; however, I can have a University official get back to you if you have a specific concern.”*

### Falsifying Pledge Information

Pledge falsification is a serious issue which the credibility of our program stands.

Please know that the pledges you create through Phonathon are recorded. Donors will receive letters and reminders until they pay them. If a donor feels that they were misrepresented by a caller, they will let us

know. The experience will adversely affect that donor's feelings for Fairfield and may cause that donor to discontinue all giving to the University.

For the sake of your job and the credibility of our program, PLEASE use extreme caution and good judgment when creating pledges. When we receive letters or phone calls from donors, we will discuss the call outcome with the caller and our performance policy will be implemented.

#### Research – Caller ID

Some prospects may tell you that “you’ve already called 3 times this week” when you can see in the Call history that they’ve never been contacted. The best way to handle this situation is to tell the prospect:

*“I’m sorry to have bothered you, but calling is one of the best ways for us to keep in touch with our alumni. Our policy is to keep trying until we reach someone in person. I just need a few minutes of your time to update our records and talk with you about the Fairfield Fund.”*