



**BELLARMINE PARENT
PHONATHON
2019 VOLUNTEER GUIDE**

Thank you for volunteering your time and talent. Your personal commitment and willingness is essential to the success of the Parent Phonathon. Thank you for showing your support of our students, faculty, and staff at Bellarmine through your participation.

Why does Bellarmine need financial support?

Bellarmino relies on its community for critical support to keep the school and students excelling in many ways. It costs over \$25,000 per year to educate each student, so in a way, all families receive some tuition assistance. Additionally, Bellarmine has one of the largest financial aid programs in California.

Without the generous support from its community, Bellarmine could not operate as it does today. Our ability to provide opportunities in Christian service, athletics, co-curriculars, and financial aid depends on the generous donations we receive every year.

What is The Bellarmine Fund and how are the donations used?

Donations to The Bellarmine Fund are used to fund the school's greatest priorities in providing educational opportunities inside and outside of the classroom. Immersion trips, Kairos retreats, co-curricular activities, and athletic teams are a few examples of programs that benefit substantially from Bellarmine Fund gifts. These experiences help teach students broader life lessons as we aim to develop the whole person. The Bellarmine Fund is the primary way for parents to give to enhance their son's education and help close the tuition gap. It is a pillar of support for Bellarmine's well-rounded Jesuit education.

What is the tuition gap?

The tuition gap is the difference between the amount Bellarmine charges in tuition and the cost for Bellarmine to educate one student. This year our per student costs are over \$22,000, leaving a tuition gap of over \$3,000. Bellarmine asks all parents to consider making a contribution to help ensure that we have the resources and programs necessary to educate their sons.

Why is participation important?

Last school year, 70% of solicitable parents gave a gift to support Bellarmine. It was a record level of participation and highlights that our parents truly believe in the Jesuit mission of Bellarmine. Additionally, many Foundations look at parent participation levels when awarding grants.

Why is a pledge important?

A four (or multi) year pledge helps both the school and the parent. Pledges give us insight into what funds will be available over time; and they save the parent time since they will not be called each year after they have made a pledge commitment.

Before The Call

Read/review The Bellarmine Fund brochure, the Phonathon Guide, and FAQ's – they should provide you answers to most of the questions you might receive.

Review the individual's Phonathon card – parent names, occupation, name and year of son(s), prior giving history, matching gift company?, etc.

Read any notes from previous calling nights – in some cases there may be instructions about which parent to speak to, what was previously discussed, etc.

Relax and be confident – you, and the parent you are calling share a special common bond, you are both part of the unique Bellarmine community.

Making The Call

Start by identifying who you are and why you are calling

- “Hi, my name is _____, and my son _____ is(was) a _____ (class year) at Bellarmine. I’m calling today as part of the parent phonathon and specifically the annual giving brochure that was recently mailed to you and I also want to welcome you (back) to the Bellarmine community and ask for your help in closing the tuition gap.”

Ask about their family's experience at Bellarmine

- For new families, offer to answer questions they might have about everyday life as a Bellarmine parent.
- Ask what their son is involved in on the campus, try to make a connection through your sons.
- In general try to make a personal connection. As a Bell parent, you share an important experience with everyone we are calling.

Share your own reasons for supporting Bellarmine

Explain why you are volunteering, and why you support Bellarmine. A few examples might be:

- My son is having or had a great experience
- I believe in Jesuit education
- I feel like a part of the community here

Transition into an ask of support

- Ask if they are able to make a 4-year pledge of \$3,000 per year (\$12,000 pledge total). \$3,000 a year makes them President's Club member and at the same time helps close the tuition gap. As a member of the President's Club they will be invited to the recognition dinner that is typically held in October. If they are not comfortable with that level, be understanding and positive.

- Ask that they give a gift that is both generous and reasonable for their circumstances and remind them that a gift at any level makes an incredible impact and participation is very important. No matter the amount, ask if they would like to make a 4-year pledge.
- For returning families with a giving history, thank them for their past support and ask them if they can renew their support at the same level or upgrade this year. Ask if a multi-year pledge would be easier for them and explain why a pledge may benefit them.

Getting the answer

- If the answer is yes, great!
 - Thank them for their support and take their pledge/gift information (see recording gifts below)
- If the answer is no, be understanding and positive
 - Ask why not. We try to understand and be responsive to all of our parents and it helps to keep track of why people choose not to give.
 - Be respectful and ask if a call in the spring might be a better time for them to consider making a gift.

Reaching the answering machine

- If there is only one number listed, please leave a message asking that they call back Brian Christensen, Director – Annual Giving at 408-537-9210.
- If there are multiple phone numbers listed please start with the home number, followed by male cell then female cell leaving a message on the last number called. In most cases this will be the female cell number.
- Please indicate on the card that a message was left and at which number.

Recording Gifts

The phonathon card contains sections for three types of gifts, and a shaded box for payment information.

Gift Types

- 1-Time Gift
 - An immediate one time gift
 - For this gift, just enter the gift amount
- Recurring Gift
 - A gift that repeats at some frequency (annual, quarterly, etc) indefinitely
 - For this gift, enter the gift amount, and how often payments should be processed
- Pledge
 - A gift paid in installments with a defined end date.
 - For this gift, enter the total amount pledged, the amount per installment, and the payment frequency
 - If they are making monthly payments, we spread the pledge over 10 months per year, not 12. (i.e.: \$1,000 pledge is \$100 per month)

Payment Method

- Select credit/debit card for those who will pay immediately by card.
- Select send statement for those who will pay later (typically by check)
- Start date is date of first payment. In general that would be the date you record the gift.
- If they would like to gift stock, please confirm the best contact number and let them know that I will follow up with them with the stock transfer form.

Overcoming Objections

Many people will give a reason why they cannot support Bellarmine this year. While objections vary in quality, it's important that they are all acknowledged and (where appropriate) overcome through respectful conversation. Here are a few suggested responses to common objections:

Tuition is already too expensive

- Bellarmine's tuition still falls short of the cost of education by more than \$3,000.
- Bellarmine's tuition is still lower than some of the other local private schools and yet we believe we offer a superior education.
- Tuition is not cheap, but Bellarmine offers varied opportunities for growth and individual attention from faculty. Bellarmine does everything it can to make sure tuition is a good value.

Bellarmino already has so much money. My donation won't make a difference.

- Participation counts. Your gift is a vote of confidence in Bellarmine at any size, and shows that our parents believe in our mission. 70% of parents supported Bellarmine at some level last year.
- Any size gift can aggregate to an incredible impact. The Bellarmine Fund works by pooling together gifts of all sizes to make the maximum impact for our students.
- Many of Bellarmine's largest gifts are restricted for specific, often capital, uses. While these generous gifts do great things, we need financial support from our parent community to fulfill our mission.

Bellarmino is doing fine, just look at the campus.

It's true that we have great new facilities, but how we fill the buildings is most important. Donating to The Bellarmine Fund helps make sure your son has access to the best faculty and life-changing opportunities like immersion trips and co-curriculars.

You're asking for too much money.

I understand that this sounds like a lot. We thought that this might be an appropriate amount for you to give, but it sounds like we missed the mark. Is there a gift size that you would be more comfortable with?

No (no reason given)

Can I ask why not? Be understanding and remind them that Bellarmine tries to be responsive to its parents, and it helps to keep track of why people choose not to give. Be respectful and ask if a call in the spring might be a better time for them.

Notes

In making these calls, you are serving as an ambassador for Bellarmine. The notes you take help allow the Advancement Office to be more responsive to parents. Please make sure to leave notes in the section along the right of the card or on the back, putting your name and the date on each note.

If you find out that any contact information is incorrect, please cross it out on the card. You can also write new information directly on the card.

If you speak with a parent that sounds very enthusiastic and might make a good Phonathon caller next year, please circle the parent's name on the card and make a note. We can always use more volunteers!

Closing the night

Time your last call so that we end each evening by 8:00 p.m.

Complete the cards for each person you contacted or were unable to contact this evening – adding brief comments where you think necessary

Divide your cards into 5 stacks:

- Gift or pledge made
- Will give online or send in brochure envelope
- Call back later (on another night of the Phonathon or later)
- Unable to give
- No contact

Turn in phonathon cards and notes at the end of each night.

**THANK YOU FOR GIVING YOUR TIME AND ENERGY
TO STRENGTHEN BELLARMINE. GO BELLS!
BELLARMINE PARENT PHONATHON – FAQ's**

Key School Info

- Current tuition gap is greater than \$3,000
- To give online, there is a giving button on the BCP homepage
- Or the webpage is: www.bcp.org/give
- Annual Giving Director, Brian Christensen, 408-537-9210, bchristensen@bcp.org
- Recognition levels: President's Club, \$2,500 Board of Fellows, \$5,000, Chancellor's Circle, \$10,000
- This year's President's Award Dinner will be held in the fall. The Board of Fellows Reception is in the spring.
- Webpage for matching gift details: www.matchinggifts.com/bcp



Calling Info

- Dial "9" when dialing out. You do not need to dial the area code if it is a "408" prefix
- If you reach voicemail on first attempt, do not leave message
- For internet access, connect to the Bellarmine network "Extreme", the password is: "Ignatius"

The Bellarmine Fund Info

- The Bellarmine Fund supports the school's greatest needs: immersion trips, Kairos retreats, co-curricular activities, athletic teams and financial aid are some examples that benefit from Bellarmine Fund gifts.
- 70% of parent participation last year (many companies/foundations look at our participation percentage when awarding grants)
- Looking for 4 (or multi) year pledge or 1-time gifts
- Pledges help us and them – we know what funds will be available and saves them time. No more calls!
- Pledges can be increased or decreased at any time
- We spread monthly payments over 10 months, not 12. A 4 year pledge has 40 consecutive monthly pledge payments (annual pledge of \$1,000 = \$100/month)
- Gifts of any size are appreciated and truly make a difference

Confidentiality

Please keep in mind that the giving records and contact information is confidential. Access to this information is granted to conduct business on behalf of Bellarmine College Preparatory and are not to be shared nor used for any other purposes.