

1. GREETINGS AND INTRO

Hello, may I speak with [PROSPECT NAME]? Hi, [FIRST NAME], my name is [YOUR FIRST NAME]. I am a student at Dalhousie University. How are you this evening? [LISTEN AND RESPOND]

Why the call?

— That’s good to hear! We’re calling alumni for several reasons tonight: to discuss what’s happening at Dalhousie, to update your records, and to invite alumni to consider supporting Dalhousie this year. **Do you have a few minutes to talk?**

[If no] ... That’s fine! We’ll call you back at a different time. Have a good night!

[If yes] ... **Tell them what’s happening at Dal:**

As you likely already know, due to COVID-19 the majority of Dalhousie courses this academic year are being delivered online to ensure our community’s health and wellbeing*

Anticipated question: What’s that like so far?

Sample answer: It’s different, but the online learning platforms have been enhanced and are actually pretty great. It’s almost like being inside a classroom and in some ways we’re more connected because the new platforms mean students can connect anytime and from pretty much anywhere. We still get the same high-quality instruction plus the university has increased supports like financial aid. All-in-all, it’s the best it can be.

Tone: Be upbeat and positive about online learning but don’t oversell it.

So a lot of things are different this year, but as we do every year, we’re still making our annual calls to alumni. Normally our Phonathon callers work on campus, but this year I am one of the student callers working from home. I feel pretty lucky -- Phonathon provides me with meaningful and valuable work experience. And keeping it going this year is one of the ways Dal is helping students like me through these challenging times.

***NOTE: it’s very important that you talk about your own experiences so you can have a natural conversation with alumni.**

2. UPDATE CONTACT INFORMATION

I’d like to begin by confirming that your record is up to date.

Before I do, I want to guarantee your personal information WILL NOT be disclosed, shared with anyone or used for any other purposes than connecting with you and keeping you updated on out events. If you’d like to learn more, you can do so by googling our program, “Dalhousie Phonathon.”

- Is your mailing address still (Street number and name)?
- And you still use (Email address)? **[Or]** We don't have an email on file for you. Do you mind providing us with one?
- Is this your cell that I'm reaching you at?
 - **[If yes]** ... Thanks for the confirmation. **Copy and paste the same number in the "cellphone" box.*
 - **[If no]** ... Recently, we've started collecting cell phone numbers to build closer relationships with our alumni. DO you mind providing us with yours? [Write down the cellphone number] Would you like Dalhousie to reach you at this new cellphone number from now on? [Make a note if they say no].

3. RAPPORT BUILDING

I see that you graduated from **[FACULTY]** in **[GRAD YEAR]**. How did you like your program? There are some interesting things happening within your faculty these days. [\[Supply updates from their faculty.\]](#)

4. TRANSITION: RELATE AND SHIFT

Ask questions to develop a connection with alum.

- How did your Dal degree helped you prepare for your career?
- What's your most memorable memory at Dal? Did you have any favorite profs, classes, spots on campus, or extracurricular activities?
- Did you receive any support from your Dal community—financial or otherwise?
- When was the last time you visited Dal? *(You can use this to talk about the differences between their time at Dal and yours).*

Thanks for sharing. I also have already had some memorable moments at Dal. [\[Share your personal experience at Dal that aligns with fundraising priorities. Talk about how Dal's helping you prepare for your future career and how grateful you are for the opportunities that you are being given.\]](#)

5. MAKE THE ASK

Thank you for telling me about your experience at Dal! Before we end the call, I'd like to talk to you about the Student Relief Fund being organized by Dalhousie. As the pandemic has drastically changed students' lives, they need the community's support now more than ever. This fund is giving back to the students who need it most, as it'll give them better access to

mental health assistance; technology services; and most importantly, financial assistance in the form of a scholarship or bursary. Would you be willing to support shaping Dal students' futures by giving a one-time gift of **\$240**, or a monthly gift of **\$20** for 12 months?

- **[If yes] ...**
 - Thank you so much! This year, because students are calling from their homes instead of campus, we are not taking your credit card information, and instead we'll be sending you a pledge package over email. That being said, if you'd like to donate right now, you can immediately go to giving.dal.ca to honour your pledge after the call.
 - Thank you so much [PROSPECT NAME] for taking the time with speaking with me, and for your generous gift! Your support makes it possible for Dalhousie to provide students with scholarships, bursaries and real-world learning opportunities that add tremendous value to the Dalhousie experience. I hope you have a good night!
- **[If no] ...**
 - That's totally fine! I understand that not everyone is able to do that at the time, and if you'd like, you can donate any amount that you'd like to any program, faculty, or other things that interest you. We'd just send you an email and you can fulfill your donation whenever you'd be ready.
 - **[If yes] ...** Thank you so much! This year, because students are calling from their homes instead of campus (see above for more) ...
 - **[If no] ...** That's fine—I totally understand. Thank you so much [PROSPECT NAME] for taking the time to speak with me, I hope you have a good evening!