WELLESLEY

Student Philanthropy Officers

The Wellesley Fund

A Guidebook

Fall 2021

Philanthropy Jargon

Appeal	Pieces of marketing to educate constituents about
Callback	Prospect picks up the call but does not have the time to talk. Ask when a better time to reach them would be. Make note of their response and report accordingly. ie) reschedule call or mark as DNC/DNS
Designation	Some alumnae will ask for their gift to be "designated" to a specific place at Wellesley, such as financial aid, sports, or religious organizations. While we typically discourage this, because our non-designated funds (the default) go to wherever they are most needed, some donors are very committed to certain aspects of Wellesley. There are a few designation options on the Call Center Page, but if they ask for something specific, make sure you put it in the comment section of the profile, and alert your supervisor once the call is over, so she can pass the information to Stephanie
Do Not Call (DNC)	Should not call, can send emails, mail, etc
Do Not Solicit (DNS)	Do not contact
Durant Society	Leadership giving society - 2500 gift, (1-5) 500, (6-10) 1000
Left a Message	Prospect did not pick up and SPO left a message explaining reason for call
LYBUNT	Pronounced: Lie bunt. Stands for Last Year But Unfortunately Not This. They made a gift last fiscal year, but they have not renewed their gift this year
Needs Update	Outdated information on prospect. Always make sure to double check any contact information at the end of a call
Online Gift	When a prospect commits to a $$ amount then makes the gift over the phone via GiveCampus
Prospect	Who we call

The Script

(1) **Introduce Yourself**
- Be upfront and honest about the reason for your call
- Always ask permission before starting a conversation

(2) **Transition to Rapport**
- An easy way to start is to take your time in giving campus updates and give them room to interject and ask questions!

(3) **Start a Conversation**
- Ask a Rapport question to get things moving
- Ask them if there is anything they are curious about or have questions about!

(4) **Transition to Ask**
- This should be an extension of your conversation. Try to make it flow!

(5) **Ask**
  - Acknowledge
  - Deflect
- Second Ask
  - Acknowledge
  - Deflect
- Third Ask (Renewal + 10% Challenge)
  - Acknowledge
- Fourth Ask (Renewal and/or Specified Pledge)
  - Acknowledge

(6) **Close the Deal**
- Push for a specified pledge (*I see you have consistently donated 500$ in the past, can I put you down for 600$ this year?)*
- Get it on a credit card!
- Thank profusely
- Ask about matching gifts through employer (this is rare, but does happen!)
- Always confirm contact information

(7) **Say Goodbye**
- Always say thank you, regardless of gift outcome!

I'm sure this is very different from the scripts you are used to! This one is meant to be very simple. I intend to teach you how to create your own scripts, with a lot of guidance of course! In the following, you will find scripting and examples that will prepare you for almost every call you make.

Building Rapport

General Questions for Alum:

"I see you majored in _____. What did you like most about __(prospect's major)__?"
"Were you involved in any clubs or activities while you were a student?" "I'm actually involved in ___."

"Where did you live when you were on campus?"

"What was your favorite study spot?"

*** The science center update is a great talking point for all alumni. The older ones love to chat about how it has changed, the younger ones want to know if it's finished yet!

Reunion Specific:

"What are you most looking forward to at reunion?"
"Have you been to reunion before?"

Parent Specific:

"Has your child chosen a major? What is she/are they considering? Does she/do they enjoy it?"
"Is she/Are they a member of any clubs or sports teams?"
"Why did she/they choose Wellesley? Is she/Are they enjoying it?"

Transition to the Ask & The Ask

Try to transition the conversation naturally to "the ask."

For example: "I am so glad to hear you really enjoyed being on such and such sports teams as a student! Thanks to gifts to The Wellesley Fund, we are able to continue to provide student athletes the most up-to-date facilities. As I had mentioned earlier, I am calling on behalf of the Wellesley Fund, and from our conversation I can see how much you valued your time on the sports team and I would like to know if you will support the Wellesley Fund, and in turn, all of our athletic programs. Will you make a gift of $___, today?

Here is a more general example:

"As I said, I am calling on behalf of The Wellesley Fund, and I want to invite you to join the Wellesley community of donors. Gifts to The Wellesley Fund go to work immediately to improve all aspects of campus life, increase our need-based financial aid packages, support

Objections

***WELCOME OBJECTIONS* – Objections are NOT rejections!!**
The prospect is engaging you further in the conversation, take that opportunity!

What do you do when someone gives a negative reason for why they don't want to give?

1. Acknowledge - You understand the reason; but,
2. Deflect! – Turn that objection into a positive reason to give!

Never forget: **ASK ➡ ACKNOWLEDGE ➡ DEFLECT**

Below, you will find some examples of objections you may receive, and the appropriate response.

*These are not the only objections you will encounter, but they should give you an idea of what people might say and how you can turn a negative into a positive.

"I Can't Give That Much" Objection

Deflection: "You can help Wellesley continue to ensure that the very best students attend regardless of their ability to pay. Wellesley is able to accept the highest caliber of students based solely on merit and without consideration of financial need, something that is unique to a handful of elite schools. The only way we can remain a need-blind institution is for alumnae to support The Wellesley Fund."

Deflection: "Not only do gifts from alums help preserve the Wellesley campus you remember, but by giving, alumnae participation rates translate into a vote of confidence for one's alma mater. It also strengthens Wellesley's reputation for excellence.

<u>Reunion Specific</u>

Deflection: "Participation in your reunion year is particularly important to help you and your classmates reach your goals. Your class has set a goal of $XXX and a participation rate of XX%. [*Include progress if available*] Will you make a gift of <u>(Graduation Year in dollars and cents)</u> in honor of your graduation year?"

"I'm Broke" Objections

Objection: *"I can't make a **big gift**...."*
Deflection 1: I understand, I've spoken to many alums who are in the same situation. However, what we count on more than a dollar amount is participation at a level you're

"I Have Other Priorities/No Room in My Budget" Objections

Objection: *"I just had a baby."*
Deflection: Congratulations Mr./Mrs. _____! Is this your first child?
I understand that your budget may be tight right now. What's really important to us is not the amount of your gift, but your participation in our efforts! It helps us to maintain our prestigious national ranking.
With this in mind, can we count on you for a gift of $___? (Go down to the next ask level)

Objection: *"I just bought a car/bought a house."*
Deflection: "Congratulations! I realize that is costly, but your degree from Wellesley has helped you reach this point. Many alums were supporting the college during the time you were a student and that enhanced your experience. In the same way, we count on alums like you to help today's students."
*** Tread carefully with this one & make sure they are employed, not just the spouse***

Objection: *"I give to many other charitable organizations...."*
Deflection: That is fantastic! Many alums have told me about all of the wonderful causes they support with their generosity. It's great that you are representing Wellesley's motto "not to be served, but to serve." I'd like to ask you to consider Wellesley among those institutions and organizations you feel are worthy of your support. Can I count on you for a gift of $XXX (ask at next level)?

"I Have a Problem" Objections

Objection: *"I don't know where my money goes"*
Deflection 1: You have the ability to choose where your gift goes! What area are you most passionate about on campus? Your gift can go to directly supporting that area.
Deflection 2: Gifts to the Wellesley Fund help cover a number of things related to the annual operating budget, and we rely on donor generosity to maintain our excellent level of programming. A large portion of this fund covers financial aid for students like me. You can also dedicate *all* of your gift to that, or things like campus renewal projects (in addition to a number of other designations!).

Objection: *"Wellesley is just too liberal/radical these days"*
Deflection: The mission of the College has always been to educate women who will make a difference in the world. While some things have changed, Wellesley's commitment to women and the Liberal Arts remains the same. You can rest assured that many of the same Wellesley traditions you remember are still here and followed with great enthusiasm! (You can give examples such as hoop rolling, Flower Sunday, step singing, Reunion, etc) Will you support Wellesley and to help preserve all of the wonderful traditions that you remember? (ask at next level)

I Don't Like Phone Call Objections

Objection: *I don't like phone solicitations/phone calls"*
Deflection: I'm sorry to trouble you. Unfortunately, with more than 36,000 Wellesley alums/thousands of Wellesley parents in the world, the phone is the most effective way to make a personal contact and let you know what is happening on campus.

Objection: *I don't like to pledge over the phone."*
Deflection: We call our alums by phone because it's more cost effective, and helps us reach a larger number of alums/parents.
We like to ask you to make a pledge over the phone because:
- It saves money in postage and handling!
- We can plan for our budget better!

Objection: *"Just take me off the list."*
Deflection: "Because we have such a small alum base, we really like to at least make contact with each of our alums every year. We're happy to give you a call again next year if you aren't interested in giving at the moment

If s/he confirms a request to be removed from the calling list: Wrap up the call by saying "I will code this so that you are taken off the appropriate list(s). Is it ok if Wellesley still sends you mail? Please allow our systems a few days to recognize the change. Thank you for your time, have a wonderful evening."

Objection: *"Send me something in writing"*
Deflection: I will send you an email with a link to give right after this call. Is (email address) still a good place to reach you?

"I Already Gave" Objections

Objection: *"I gave last year"*
Deflection: We really appreciate your previous support. The Wellesley Fund relies on alum/parent contributions to support faculty salaries, educational programs, student activities, and other services and facilities that support students like me. Would you be willing to renew your support this year and help us reach this year's goals with a gift of ____?

Objection: *"I already gave this year"*
Deflection: Our records show that you did give within this calendar year. However, Wellesley's fiscal year runs from July 1st of each year through June 30th of the following year. We are calling you again this calendar year because we are already in a new fiscal year. Giving to Wellesley College early benefits both you as well as the College. If you give now, you'll be taken off of our calling list for this year, meaning that you won't be called again before next fall. Also, the College benefits by being able to use your donation immediately for things such

Deflection: With a gift to The Wellesley Fund, funds can be used directly for their education. You can essentially contribute to their major or activities they do on campus.

Objection: *I support my alma mater and my child will support Wellesley when they graduate.*
Deflection: If you get involved now, the money can be used to make immediate changes in your child's educational experience.

Condensed Objection Responses:

- **Silent Scholarship:** All Wellesley Students receive a "silent" 30,000 dollar scholarship, making financial aid a priority for everyone! By donating you can help keep costs down and allow Wellesley to be this generous!
- **Endowment:** Though Wellesley is fortunate enough to have a large endowment, it has lots of restrictions on where, when, and how this money can be spent. The Wellesley fund does not have these restrictions and therefore we can step in and full in funding gaps and respond to emergencies!
- **Ranking:** Participation is *so* important, so even small gifts matter! Wellesley is consistently ranked highly in US News reports because we have such an incredibly active alumni community. By giving any amount you can, you are helping to keep Wellesley funded and in good rankings!
- **General Wellesley Disagreement:** Money from the Wellesley fund goes to support all groups and projects on campus! By giving you can aid in helping to fix the problem you are concerned about (food quality/dorm quality/lack of diverse groups on campus, etc)

They Said Yes!... Now What?

"$____? Wonderful! Thank you so much! As soon as you're ready I can take down your information."
***In Call Center: Make a record outcome as "Gift" and enter the amount. Click blue "Open Credit Card Payment" to launch GiveCampus form. Enter amount on first window, click agree to terms of service, and enter CC number / expiration date / cardholder name and repeat back all information to confirm accuracy and confirm if any contact information has changed (if so, note new information in comments). Donor will receive an email confirmation from the GiveCampus form immediately.**

Credit Card Objection Response

"We are encouraging all of our generous donors to make their gifts on a credit card, putting gifts to use right away. Credit cards are preferred because that cuts down on our processing costs and paper, making your gift go further for our students and can be used immediately by the college. It also saves you a trip to the post office and you will be able to get points on your credit card!"

Some alumni may be cautious about giving credit card information over the phone! You can assure them that we use a secure and entrusted transaction service, and that we keep none of their credit card information stored. It is the same as swiping their card in the grocery store!

If they are still wary, let them know we can send them a link to give after the phone call.

Closing the Call

Update Contact Information On Every Call!

Always confirm:
Address, Phone Number, Email Address

Made Gifts Examples:

- "I really appreciate you taking the time to speak with me this evening. I know you mentioned that you haven't been back to campus in years – hopefully you'll be able to visit soon…. Before you go let's just quickly recap our conversation, you made a pledge of $XXX.XX that you would like to go _____ fund. I'd also like to confirm that your mailing address is _____ , and the best phone number to reach you at is still xxx-xxx-xxxx. Is your email address still _____? Thank you again for your time and have a great night!"

- "I know you were rushing out the door, so it means so much to me that you could give me a couple of minutes of your time….. Before you go let's quickly recap our conversation. You made a pledge of $XXX.XX that you would like to go _____ fund. I'd also like to confirm that your mailing address is _____ , and the best phone number to reach you at is xxx-xxx-xxxx. Is your email address still _____. Thank you again for your time and have a great night!"

Parent Specific:

- "It's so wonderful that your daughter is enjoying her first semester here at Wellesley. Hopefully she'll continue to settle into her room in _____ (name of dorm), and I'll be sure to look out for her in future classes…. Before you go let's quickly recap our conversation, you made a pledge of $XXX.XX that you would like to go _____ fund. I'd also like to confirm that your mailing address is _____ , and the best phone number to reach you at is xxx-xxx-xxxx. Is your email address still _____. Thank you again for your time and have a great night!" Thank you again for your time and have a great night!"

Did NOT Make A Gift

- "Thank you for taking the time to speak with me today. Before I go, may I confirm that your mailing address is _____ ? Is your phone number still xxx-xxx-xxxx and your email address _____? Thank you! Do you have any other questions for me about Wellesley?"

Bringing It Together

You now have all of the components you need to make a call. Now you can put them together, make them feel comfortable and create your own scripts based on the outline below. Remember to hit all the essential areas.

(8) **Introduce Yourself**

(9) **Transition to Rapport**

- Be upfront and honest about the reason for your call
- Always ask permission before starting a conversation

(10) **Start a Conversation**

- Ask a Rapport question to get things moving

(11) **Transition to Ask**

- This should be an extension of your conversation. Try to make it flow!

(12) **Ask**

- Acknowledge
- Deflect

- Second Ask
  - Acknowledge
  - Deflect
- Third Ask
  - Acknowledge
  - Deflect
- Fourth Ask
  - Acknowledge

(13) **Close the Deal**

- Push for a specified pledge
- Get it on a credit card!
- Thank profusely
- Ask about matching gifts through employer
- Always confirm contact information

(14) **Say Goodbye**

- Always say thank you, regardless of pledge!

Zoom Phone

No actual phones!



Phonath1@wellesley.edu	**art13ist!**
Phonath2@wellesley.edu	**art14ist!**
Phonath3@wellesley.edu	**art15ist!**
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