

# Getting to Know You: Using Phonathon to Engage with Alumni

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- ⌘ HWS Connect is the Student Phonathon at Hobart & William Smith Colleges
- ⌘ Originally it was volunteer
- ⌘ Sole purpose was raising money for the Annual Fund
- ⌘ Became a paid position in 2006
- ⌘ Called based off of more traditional segmentation: LYBUNT, SYBUNT, Reunion, Athletics
- ⌘ Thank you e-mails with the giving link sent to all constituents who make a gift or pledge over the phone starting in 2009
- ⌘ Thank you pledge card and note sent to all constituents who make a pledge starting in 2011

# HWS Connect: History

- ⌘ Calling segmented by CLASS YEAR
- ⌘ INTERVIEW styling calling takes place for the first  $\frac{3}{4}$  of the call
- ⌘ THANK YOU calling to start every session
- ⌘ Special EVENT calling
- ⌘ Athletes calling for their TEAM
- ⌘ 'Sorry we missed you' postcards sent to all constituents we did not reach by phone

# A New Era



- ⌘ James Langley ideals
  - ⌘ Show the alumni you care
  - ⌘ Interested in *them* not just their money
- ⌘ Increase connections and touch points
- ⌘ Nostalgia
- ⌘ Increase dollar and pledge/gift rates
- ⌘ Increase stewardship

# Why Change?

- & Class presidents
- & World Events
- & Campus Events
- & President of the Colleges
- & Campus & off-campus hangouts
- & Athletic success
- & Famous alums
- & Current campus events, athletics, general talking points

# Get them talking

- ⌘ Frisbee Team was popular
- ⌘ The Oaks Bar- corner of Hamilton and Pulteney
- ⌘ Fall nationals started- still do this soapbox derby during Homecoming Weekend
- ⌘ Lacrosse won the national championship
- ⌘ Spring Weekend- concert and party weekend
- ⌘ Floods of 1972
- ⌘ Graduation Traditions- peers gave each other diplomas not President and mixed Hobart and William Smith
- ⌘ Title IX, Winn-Seeley Gym opens
- ⌘ Earth Day Celebrations
- ⌘ President→Dr. Allan Kuusisto
- ⌘ Last Reunion→ 40<sup>th</sup> in 2012
- ⌘ Next Reunion→ 45<sup>th</sup> in 2017

## Example : Classes of 1972



- ⌘ What was your favorite part of your college experience at HWS?
  - ⌘ What was it like to experience...(reference fact sheet)
- ⌘ Where was your favorite hangout?
- ⌘ Do you keep in touch with any old classmates?
- ⌘ When was the last time you were back on campus?
- ⌘ I see you were involved in (sport, club, fraternity)→ ask about an experience, if it is still around today, if it is a sport you can talk about how the team did this year

Example: Open ended questions

- ⌘ Who are we calling tonight?
- ⌘ What are their class highlights?
- ⌘ What's new with HWS?
- ⌘ 10 Thank You calls to Annual Fund donors
- ⌘ Class specific calls
- ⌘ Thank you notes to those who made pledges
- ⌘ 'Sorry we missed you' postcards (*if applicable*)

Example: A night of  
calling



- ⌘ Event Based calling
  - ⌘ Any event featuring President Gearan- 2 weeks before
  - ⌘ Events with low RSVPs- 1 week before
- ⌘ Team Fundraising
  - ⌘ Athletes call for their team to alums of that team with assistance from current callers
- ⌘ Parents of Graduates and Parents of Current Students
  - ⌘ These weren't new segments, but they were continued in their own segments

# Special Calls

	FY13	FY14
Attempts	58,028	39,803
Contacts	8,507 (14.6%)	6,317 (15.9%)
Refusals	79%	68.9%
Phone call resulting in a Gift/Pledge/Follow Up request	20.8%	31%
Average Gift on a Card	\$91	\$102
Average Pledge	\$153	\$175.26
Total Dollars	\$214,621.24	\$138,677.49

Did it work?

- ⌘ 'It was nice to reminisce about the old times with a current student. I'm glad the student called because I think I forgot to give one year.'  
– Virginia '54
- ⌘ 'As a former caller at HWS, it was great to be on the receiving end of a call as an alumnus. Amanda did a great job.' –Peter '07
- ⌘ 'I spoke to Tori who was personal, great listener, and built rapport very quickly.' –Joe '79

## Praise from alums



- ⌘ Student Phonathon at St. Olaf College
- ⌘ Many iterations over the years
- ⌘ Managed in-house starting in 2009
- ⌘ 40 students on-staff, including 8 student supervisors.
- ⌘ Call throughout the academic year (4-1-4)

# Ole Callers: History

- ⌘ Jim Langley case studies show that when students interview alumni, in-person, on behalf of the college, their giving increases.
- ⌘ Shows the college cares
- ⌘ Unexpected
- ⌘ May learn new things
- ⌘ Currently, not enough resources for in-person interviews.

# Alumni Insights

## Phone Interviews

- ⌘ Individual responses will be confidential.
- ⌘ Report summarized results on a website.
- ⌘ Share more detailed results with a variety of senior St. Olaf administrators.

# What to do with the info?



- ⌘ 200 randomly selected alumni
- ⌘ Not assigned to a staff manager
- ⌘ Not assigned to a Class Fund Agent
- ⌘ Aren't married to an alum
- ⌘ Haven't given in FY14, but have given every year FY10-FY13

# Who will be invited?

- ⌘ Introduction from president
- ⌘ Follow-ups with details from Matt
- ⌘ Two reminders from Matt
- ⌘ Alumni pick appointment time on a website

# Invites and Scheduling

- ⌘ Sun 3-5 pm
- ⌘ Mon 9-11 am, 4-6 pm, 6-8 pm
- ⌘ Tue 4-6 pm, 6-8pm
- ⌘ Wed 9-11am, 4-6pm, 6-8pm
- ⌘ Thu 4-6pm, 6-8pm
- ⌘ Fri 9-11am, 4-6pm
- ⌘ Sat 3-5pm
- ⌘ Mornings most popular

# Schedule



Location



Services



Staff & Time



Your Details

## When and with who?

Pick for me

Jodie Rollins

Jodie July -Se...

← Week of Aug 10 - 16, 2014 (CDT) →



Sun 10th

Mon 11th

Tue 12th

Wed 13th

Thu 14th

Fri 15th

Sat 16th

Busy

9:00am

10:30am

12:00pm

1:30pm

9:00am

10:30am

12:00pm

1:30pm

Busy

9:00am

10:30am

12:00pm

1:30pm

9:00am

10:30am

12:00pm

1:30pm

Busy

Back



- ⌘ Open-ended
- ⌘ Start with warm-up
- ⌘ Limit to 15 minutes
- ⌘ Flexible questions to fit time
- ⌘ Work with campus experts in Institutional Research and Sociology/Anthropology on exact questions, language, and order.

# What questions?

⌘ If you had to choose two or three words to sum up your experience as a student, what would they be? Can you give me concrete examples of that?



& What was your most powerful learning experience while at St. Olaf?

⌘ St. Olaf aims to prepare its graduates not only for meaningful careers, but also for their other life roles - as family members, friends, engaged citizens, members of faith communities, and life-long learners. How has St. Olaf contributed to your life and what you're doing now? (Skip if time is short).

⌘ What changes would make St. Olaf better for future students?



& What at St. Olaf must never change?

& BONUS - If you went back to St. Olaf today for pleasure, what would you study and why?

- ⌘ Students jotted notes on paper during call
- ⌘ Submitted complete notes in a Google form after call complete

# Collecting responses



& Students sent hand-written thank you notes to each participant.

Thank you!

- ⌘ Clear option for students
- ⌘ Two hour training
  - ⌘ How alumni will be invited
  - ⌘ Schedule
  - ⌘ Call center rules
  - ⌘ How to conduct interviews
  - ⌘ Walk through questions
  - ⌘ Two (non-supervisors) role-play in front of group
  - ⌘ Callers split into pairs to practice role-play
- ⌘ Practice calls
  - ⌘ Friends, alumni board, annual giving board

# Training

- ⌘ Worked with Sociology/Anthropology professor
- ⌘ Hired two Soc/Anthro majors
- ⌘ Posted results on website
- ⌘ Emailed all invited alums
- ⌘ [my.stolaf.edu/insights/executive-summary](http://my.stolaf.edu/insights/executive-summary)

# External Analysis and Report



Did they give?

# Internal Analysis and Report



Control	FY13	FY14	Difference
Donors	200	87	-133
Average Gift	\$212	\$224	+5%

Invited	FY13	FY14	Difference
Donors	200	98	-102
Average Gift	\$236	\$316	+34%

Participant Donors	FY13	FY14	FY13 – FY14 Difference
Donors	24	24	0
Average Gift	\$308	\$332	+8%



- ⌘ High-impact, non-solicitation student interaction may lead to an increase in gift amount
- ⌘ The option to interact with students (without solicitation) may lead to an increase in gift amount
- ⌘ The option to interact with students (without solicitation) does not equal a solicitation.
- ⌘ Response rate will be low – be prepared to invite more people

# Lessons

- ⌘ Students loved CoconutCalendar
- ⌘ Alumni gave their insights via email
- ⌘ Can scheduled calls work for solicitation calls?
- ⌘ Should we normally call in the morning?

## Feedback and Thoughts for Next Year

QUESTIONS!