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Annual Fund Inc. TOMORROW'S STRATEGIES TODAY

EVOLUTION

The newsletter for annual giving professionals *Volume 1, Issue 6*

AUGUST, 2004

What's Your Perspective?

Jeffrey D. Driggs, University of Utah

So often, new annual giving officers ask for sample "Annual Fund brochures" with catchy themes, or year-end letters, or letters to lapsed donors, or letters that upgrade donors. While I don't fault them for seeking assistance, my concern is that, by the question they are posing, it appears that the kind of mail pieces they are looking to craft are "inside-out," rather than "outside-in" communications.

In other words, these direct mail appeals are focusing on the institution's perspective, rather than on the prospect's concerns.

- Why should prospects care that your Annual Fund hasn't yet met its goal?
- Why should prospects care that their gift needs to come in before the end of your fiscal year?
- Why should prospects care that you're trying to increase alumni participation?
- Why should prospects care that by giving in August instead of June, they will break their string of consecutive years of giving?

These are our concerns, not theirs. They are issues for which we need to develop strategies. They may even be minor points that we work into the letters. But they are not inspiring, motivational, heart-touching topics that encourage prospects to give.

A good direct mail appeal does not need to be a flashy brochure—just a sincere letter that should thank, report, inspire, and invite. The emphasis of the letter should be based upon one of those functions. All should be included, though the order or the weight of each one can vary greatly. Let me address each of these:

A direct mail letter should thank. The letter should recognize the past support that the prospect has given. If a non-donor, note the support others have given. Don't be stingy with expressing appreciation or with giving credit. "We are a great school because of the gifts YOU have made!" (Try to be a little less vague, though!)

Inside This Issue:

Caller Interview Strategies

Terri Burris, Virginia Tech

Whether you are just starting a new Telefund program or have one that has been in existence for several years, interviewing callers is one of the most important parts of your program. Keep in mind that your program will only be as effective as the staff you hire to make the calls.

There are several different ways to conduct caller interviews. The two main types of interviews are the phone interview and the personal interview. The type of interview process you chose should be based on the size of your school as well as the number of staff members that you can commit to actually conduct the interviews. Regardless of the type of interview you chose you need to get as much information out of the interview as possible. Be sure to:

- Introduce yourself and explain your position within the organization
- Familiarize yourself with the candidate and the application/resume received
- Be able to explain the candidate's applied-for position and what is expected of them
- Build Rapport
- Ask them what they know about the position
- What interests them about the position
- Develop the desired answers to your questions so you know exactly what qualities you are looking for in your callers
- Always remain upbeat and friendly throughout the interview even if it is turning out to be a really bad one

You will need to choose the type of interview to use within your organization. Your choices include the "phone interview" which is conducted with the prospective caller calling in to your establishment. They are then asked to answer a set of questions via phone. The personal interview is a face to face interview conducted within a conference room or office with one or more people conducting the interview. There are positive and negative aspects to both types of interviews.

The phone interview seems to be most effective if you are trying to hire a lot of students/employees in short period of time. It is also helpful in determining whether the caller can speak clearly and effectively over the phone. For those that are especially picky, a phone interview can be a great first interview, and then followed by the personal. Some of the disadvantages include: not being able to see how seriously the person is taking the phone interview, their body language, or facial expressions. The advantages for the personal interview are being able to see the person within the interview, their body language, and facial expressions. The main disadvantage to the personal interview is that you do not know how they sound over the phone. The personal interview may also take more time and effort by your staff members than the phone interview. The best method, if you have the time and monetary resources, would be to conduct a personal interview with a mock phone call within the interview process. This interview can take up to 30 minutes to complete, factoring in the face-to-face component and the mock call.

To establish either type of interview process, start by setting the schedule and time limit to conduct the interviews then decide upon a designated phone line or room, and a standard set of questions.

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EVOLUTION

The newsletter for annual giving professionals

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Caller Interview Strategies

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The interview questions should be written to ascertain the callers' ability to speak clearly and effectively on the phone and to determine how persuasive the person is when making the case for your organization. Standard interview sessions should last at least fifteen minutes and should include questions that identify the type of employees that you would like to join your staff. The questions should identify any restrictions that you may have:

- Are you a full-time (university/college name) student?
- Is there a class conflict that would prevent you from working another shift?
- Are you available to work next semester?

Yes (continue job interview)

No (end interview – "We are sorry, but at this time we are only hiring students who will be here next semester as well.")

You will need to define the position and assess how comfortable the prospect will be with completing the expected duties. You will want to ask specific questions relative to the position:

- So what was it that interested you most about this job?
- How do you think alumni feel about being solicited for scholarships? Are you comfortable with asking for $500 or $1,000?
- Persuasion is the key to success with our student calling position. If you were recruiting students to attend our school how would you convince them to come here?
- Describe a project or an event here at (university/college name) that you are excited about. Are you involved in it?
- Describe your favorite restaurant and why I should dine there?
- When it comes to communicating with other people, what are your strengths and your weaknesses?

You may also wish to utilize a chart like the one below to rate the prospects overall skills during the interview.

Criteria	Poor	Good	Excellent
Enthusiasm	1	2	3
Confidence	1	2	3
Phone Manner	1	2	3
Enunciation	1	2	3
Volume	1	2	3
Rate of Speech	1	2	3
Thought into answers	1	2	3
Conciseness of answers	1	2	3
Overall rating	1	2	3

The prospect should have a "2" or above in every category and in the overall rating to be recommended for hire. If you have to repeat more than one question you may want to consider not hiring them.

No matter the type of interview you conduct the most important thing to remember is that you need to hire quality people in a fast moving environment, so dedicate at least one staff person to spend their time conducting these interviews and take them seriously.

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> "Make the first interview a phone interview"

Boosting Annual Giving Through an Increased Understanding of Alumni Opinions and Priorities

James Murphy, www.OpinionDynamics.com

In these challenging economic times, alumni financial support is increasingly important to the success of colleges and universities. Understanding the priorities and opinions of an alumni group can mean the difference between a lackluster development campaign and a record-breaking campaign.

Colleges and universities rank as bottom tier charities for most college graduates. This means that colleges must not only make a case for why they are deserving of gifts from alumni, but why they are more deserving than other charities, such as religious organizations or local charities. Many college graduates tell us they would be more willing to make a gift to their alma mater if their college made a good case for why it needs and deserves support.

Since colleges and universities are not top-of-mind charities for most college graduates, effective communications between a university and its alumni are crucial to successful development efforts. We have found that many of the basic principles of corporate communications, marketing and political campaigns can be effectively applied to alumni communications. In short, communications with alumni can often be greatly enhanced by:

- Identifying the best messages
- Choosing the optimal channel(s) for delivering the messages
- Selecting the best spokesperson

We have found a direct correlation between alumni's knowledge about the current goals and priorities of a college, and their likelihood to give – the more they know, the more likely they are to give. Our research also finds that development efforts are highly unlikely to suffer as a result of too much communication with an alumni group. A general rule of communicating with alumni should be "the more the better". Alumni who say their college does not communicate with them enough outnumber those who say their alma mater communicates with them too much by a 3-to 1 margin; those who say they receive too many communications are nearly twice as likely to give as those who say they don't receive enough communications.

General Findings

Opinion Dynamics Corporation conducted a national survey among college graduates on the issue of alumni giving in late April and early May of 2004. A telephone survey of 669 college graduates in the United States found the following:

One-third of college graduates report having made a contribution to their alma mater in the past year. Graduates of religious schools (47%) are more likely to have made gifts than private (35%) and public university (30%) graduates.

Likelihood of giving is directly correlated to age and income – 27% of those under age 50 and 29% of those earning under $50,000 have made gifts, compared to 44% of those over age 65 and 44% of those earning over $100,000.

If given $1,000 that had to be donated to charity, just 5% of college graduates would give it to their college or university, 42% would give it to a local charity, 25% would give to a medical charity and 22% would give to a religious group.

Just one-quarter of graduates who did not give to their alma mater last year say they will never do so. Nearly one-third (32%) of graduates who did not give in the past year say they might give more if their college made a good case for giving and 28% say they wish they could give, but their current financial situation does not allow.

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Convincing alumni that their gifts are central to the success of a university is integral to development efforts. Graduates who believe alumni donations are very important to enabling their college to fulfill its core mission are more than twice as likely to have made a gift last year as other alumni (59%, compared to 25%).

Reported Giving Among College Graduates

One-third of college graduates report having made a contribution to their college or university in the past year. While demographic factors such as age and income influence graduates' likelihood of giving, other factors related to the quantity and quality of communications between a college and its alumni are stronger predictors of giving. For example:

Alumni who feel informed about the current goals and priorities of their alma mater are much more likely to make a contribution than those who do not (42% compared to 17%).

College graduates who believe that alumni's giving is very important to fulfilling the core mission of their alma mater are much more likely to have made a gift than graduates who do not think it is very important (53% compared to 23%).

The volume of communications between a university and its alumni is also an important predictor of alumni giving. Alumni who feel their alma mater does a good job (45%) communicating with them are the most likely to give, followed by those who say the communications they receive from their college are too much (34%). Those who say they do not get enough communications (18%) from their alma mater are least likely to give.

Further illustrating the potential for increasing alumni giving through the use of intelligent communications, nearly one-third (30%) of college graduates say that they would give or give more if their alma mater made a good case for why they should make a gift. Fully one-half (50%) of graduates who believe alumni's giving is not very important say they would give, or give more, if their college made a good case. The research indicates that it is especially important to make a case for giving among younger alumni; 36% of graduates under age thirty say they would give, or give more, if their college made a good case and an additional 37% say they wish they could give more.

Conclusions

Convincing alumni to give money to a college or university can be a difficult task. Many college graduates do not see their alma mater to be as deserving as other charities. Furthermore, individuals like seeing the results of their charitable contributions; this obviously increases the desirability of local charities over a college that might be in a different state or on the other side of the country.

There are several general characteristics that are common to effective communications campaigns designed to increase giving:

- They stress the importance of alumni giving to fulfilling a school's core mission
- They clearly convey why a school is deserving of support
- Communications with alumni should be frequent in order to maintain and/or re-establish continuing affiliations with the school.

> "Volume of communication is an important predictor of alumni giving."

While most successful development campaigns will share many common elements, the ultimate key to their success is likely found in specific details. Every college or university is unique, as are the alumni. While alumni at one college will be most interested in supporting athletic programs, alumni of another institution will be most concerned with supporting scholarships for underprivileged students. An unpopular campus policy at one university may have unknowingly alienated some alumni, while at another university potential big donors may be holding back gifts because they do not feel the college does an adequate job of recognizing gifts.

Identifying and addressing these specific types of issues is vital to a successful campaign.

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For more information, please contact James Murphy, CEO, jmurphy@opiniondynamics.com.

Peanut Butter & Jelly: Unique Script-Based Training

Paul Clark, Virginia Tech

(Editor's Note: This is part one of a three part story. It is a novel approach and well written)

As Bob Dylan so eloquently wrote and sang in his quintessential '60's classic, "The times, they are a-changin'." While this song stands as a social comment on an era of great change in American culture, the sentiment of this tune, in the wake of the information revolution, is just as relevant to the post-millennial world of today. The era of Norman Rockwell and Sheriff Andy Taylor has faded into memory, taking with it the concept of fence-line greetings, clothesline gossip and porches used as meeting rooms. Gone are the days, for the most part, of a tight-knit community where neighbors all knew one another and participated in common events, attended the same religious centers, and were members of the same civic groups. The near requirement of two incomes for any modern family has virtually ended the art of dinner table conversation. The price of gas isn't the only part of fueling up your vehicle that has changed drastically, for the invention of "pay at the pump" credit card validation machines has ended the need to even speak to a gas attendant. Having an account down at the local IGA is a practice far removed from a world where even groceries may be bought and sold on-line. Dating, chatting, gaming, reading, shopping and browsing: verbs once associated with an afternoon at the malt shop, or even the mall, but now are practiced in the virtual world of the 21st century.

"Hey, 'sup?"
"Nothin'. 'Sup?"
"Chillin'."
"I hear that."
"Ate yet?"
"Naw."
"Wanna go?"
"Ok."
"Ok. Later."
"Later."

Seems like the dawn of globalism has created a world full of strangers.

The post-modern societal trend towards individual isolationism is well documented and certainly nothing new to the realm of common thought. While the importance of this monumental change to the basic nature of everyday communication ripples through the fabric of the industries of commerce and entertainment, it is rarely addressed as having any significant impact on the world of telefundraising. To fail to analyze the communication patterns and methods in use by today's teens and young adults is a mistake, and quite possibly a costly one. The training methods of the past do not take into account three decades of a clear slide, at the fundamental level of societal interaction, towards linguistic brevity. Endless numbers of books have been written to document the Internet culture and the creation of a new language built on creative abbreviations and smiley faces made of a colon and parentheses.

Let's remember, we're talking about a generation that felt the need to shorten "What's Up?" to "'Sup?"

But what can one gain by understanding, and embracing, the undeniable fact that today's young people communicate differently than previous generations? The answer to that question can be found by identifying your most successful callers and having an involved conversation with them, away from the headset and dialer, about some random topic. These standouts have discovered something that their counterparts, far too often, have not.

These callers know how to talk to other people.

One would think that a college student, having successfully conquered somewhere in the neighborhood of twelve years of formal education, would be more than a novice in the simple art of speaking with others. However, the unassigned variable to this equation is the receiver, or the person on the other end of their conversations. Today's college students are, in fact, very capable of communicating… with other college students. As I found out when my cable company started carrying the BBC network, if everybody else speaks one dialect and you speak another, the communication gap is yours to overcome, not theirs.

If we accept that many of today's college students are, at the very least, inexperienced in communicating with those of a different generation, we must then identify how to correct this potential for disastrous misunderstandings and broken conversations. It is not the job of a telefund or annual giving

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department manager to train college students on the primary basics of how to speak. I fear the time, payroll and patience required for that undertaking is nonexistent. Thus, another method must be used to circumvent this mélange to the best possible results, or at least to ensure the greatest efficiency in the use of available resources.

As a student caller is hired and trained, they are frequently presented with some sort of standardized script that will be used during the course of their employment. This script will outline, either in detail or in general, the gist of a particular school's philosophy and nature towards fundraising. Many times, the script will provide very helpful and beneficial background information on the specific fund drive, initiatives and accomplishments by individuals or departments at the college or university, and a bevy of other knowledge that the caller must first absorb and then become adept at relaying.

Here is one chance to eliminate poor communications and bridge generational gaps.
To ask a newly-hired college student, often a freshman, to enter into a professional setting where they are expected to call strangers of one or more previous generations, have a genuine and meaningful conversation, and then make an official request for an institution's financial support is to ask an architect to draw without a straight edge: it's possible, but they sure won't like it. One way to overcome these limitations is to present, at the initial training level, a script that is understandable to the caller. Consider that fundraising is a foreign concept to a college student, beyond asking mom and dad for pizza money. Let us first allow our potential caller to become acclimated to the basics of making an ask. To postpone their introduction to specific funds and the much-dreaded solicitation for money may be the first step to allowing your student to grasp the basics of formal speech and dialogue.

To that end, I have developed a very rudimentary and introductory level script centered around an ask that should be quite familiar to the majority of your potential callers: asking someone to eat a peanut butter and jelly sandwich. This script could very easily be morphed into a request for a myriad of other mundane asks, such as trying to get someone to watch a particular television show or play a particular game. It's not the specifics of "the ask," but the nature of the information that should be made primitive and recognizable by a trainee.
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(Look for Part Two in Next Month's Issue of Evolution!)

What's Your Perspective?

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A direct mail letter should report. This goes hand-in-hand with the thanks. Tell what you did with the money your alumni gave last year, and be specific. "Your gifts made possible 23 new scholarships," ". . . helped us secure 98 new journal subscriptions for our library," ". . . enabled Dr. Smith to develop a new treatment for the dreaded cooties." Again, so what if Annual Fund gifts only accounted for 5 percent of Dr. Smith's research budget? Who is to say what made the difference? Again, be generous with giving credit. People want to know how their "investment" did. If all that your prospects ever receive from your institution is an appeal letter, without a report of what you did with the past support (and not just a report of how much came in compared to the previous year—another "inside-out" measure), why should they give again?

A direct mail letter should inspire
It should tell the story of a person: A student who needs scholarship support or one who received it; a faculty member's research activities; a debate team's national championship, made possible by donors who funded their advisor, their travel, or their research materials; or a donor who has given for years, and why. A good, inspiring story is often the best lead for a fund-raising letter, as it can grab reader's interest right away. (Though starting with a sincere, specific thank you is also a good opening.) Shall I repeat the cliché you have heard a million times? People give to people. They don't give to fiscal year deadlines, participation upgrade campaigns, or annual goals.

A direct mail letter should invite
Don't forget to ask for a gift! Some letters go into such detail about what the school has been doing and the honors we are getting and our plans for Homecoming and on and on . . . that they never get around to inviting prospects to again join our team and help us fund whatever inspirational priority we have been touting. Go ahead and thank them again as you are doing it, but be sure to ask—don't just enclose a reply card and envelope.

An old girlfriend of mine once told me that the key to writing good letters to her was to write about her. I think she was on to something! Letters that talk about our goals, our timetables, and our clever themes-of-the-year are boring! We need to focus on the prospects, telling them what their support has done, thanking them for it, inspiring them with stories of interest to them, and inviting them to participate again. When we do that, our prospects will want to participate, and all our little internal goals, that they don't really care about, will be met anyway.
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Common Concerns With Faculty/Staff Appeals

Albert D. Melfo, Kent State University

If you have worked in a fund raising capacity for a non-profit organization for any considerable length of time, you have likely been involved in soliciting funds from your internal audience – basically, from your fellow employees. If so, you have probably been confronted with a dynamic that continues to be fairly common among employees of non-profit organizations. When it comes to making personal philanthropic gifts to their employers, employees often reply that they are already giving “through their service." I contend that this is an education issue, and that we as development professionals are responsible for educating this constituency through consistent, positive and direct responses to this objection.

Part I — Assume the High Moral Ground
(because you can, and you owe it to your organization!)
1) Giving is voluntary, regardless of whether a prospect is affiliated by interest, past attendance, or service of some type.

2) "Giving through service" is as near perfect a definition of volunteerism as I've ever heard. On the other hand, employees, by definition, are paid; in exchange for the service they provide, they draw a salary from the organization that employs them. The most straightforward comparison would be to look at IRS regulations that apply to philanthropy — if you can't get a receipt for the “donation” that can be used to declare a tax deduction, it isn't a gift. As an aside, it can be kind of interesting to frame the debate in terms of taxes — if the federal government made paying taxes voluntary, and Americans began to say "I give through my service," how would the nation's infrastructure be maintained?)

3) Accepting the "I give through my service" objection exposes you to a number of related "anti-development" arguments, such as: parents/students who say they support by paying tuition (again, this is a purchase — students pay tuition to receive an education — not support); or alumni/friends who say, in the case of state schools, "I support as a taxpayer" (this would, at best, be indirect support).

4) A Fundamental Rule of Fundraising — Any given objection is either true or false. If false, then it is only an excuse. To determine the true objection, you have to dig past the superficial.

Part II — Other Common Objections That You'll Hear
(and why they may be superficial!)
1) "I don't get paid enough to make a gift." Does the individual feel that they are paid enough, period? If not, then the objection is not to giving, but to their income level, which they are free to change, but it will take focused effort on their part, and has nothing to do with their philanthropic relationship to your organization. Or, it could just be an excuse. Or maybe they are underpaid. In any case, giving is voluntary, and they may simply decline to participate.

2) "I could be making a lot more money in the private sector" (pursuing other opportunities is always an option) "but I choose to work here" (ok, choice is good) "because I believe in what we do" (do they feel that organizations/missions/efforts that they believe in are worthy of their support?)

3) "I don't get paid nearly as much as I could if I worked in the private sector" (but you are still here) "and as soon as my last child graduates, I will be looking for work elsewhere" (what is the value of the college education that their children have received, likely at no cost, given the education benefits in place at most universities?)

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4) "The administration consistently fails to fund my school/dept/projects" (so you understand how fundraising is a means of offsetting shortfalls, and can appreciate the importance of private support to our abilities to move forward…)

5) "My gift won't make a difference" — all support makes a difference, and participation is very important.

Part III — Some Responses (Concepts to keep high on your mind so you can maintain confidence!)

1) Another fundamental: "Charity begins at home." Simply, if not our internal "audiences," (faculty/staff), who are our most obvious prospects/customers? There is no mystery as to why product manufacturers/service providers generally provide their employees with deep discounts on their own products and services. Car sales people drive cars, and cell phone dealers use cell phones. Separately, if an individual does not believe in the mission of the organization with whom they are employed, there is a bigger problem — which again has nothing to do with philanthropy. (Would you vote for a political candidate who would not vote for him/herself?)

The "Bigger Picture" Argument: Often, when non-profits approach corporations and foundations to seek substantial gifts, those organizations want to know how many individual supporters the NPO has, because if that NPO's own employees are unwilling to support it, what message does this send when representatives of that organization turn to external sources for support?

3) Setting an example, sending a message — Just as individual fundraisers must be able to respond truthfully and positively to the donor who asks them "How much do *you* give to Alma Mater College?" organizations need the same "leverage." Support from faculty and staff — above and beyond their important day-to-day duties as employees — is a strong vote of confidence in a university's mission.

Summary

If you work for a non-profit as a fundraiser, then trying to raise money is probably what you spend most of your time doing. Faculty and non-development staff members are your colleagues and peers, not a generic demographic audience. As professional fundraisers, we are aware of this, but it is our responsibility to educate these colleagues that neither are we some generic, external marketing group — our efforts when successful have a direct and immediate impact on our organization's ability to achieve its mission, on our ability to effectively manage our programs, and most importantly on the quality of the education that we can provide to current and future students.

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AFI E-Philanthropy Awards Update

The race is going to be tight. As many of you know, The Sales Factory has partnered with AFI in presenting the AFI E-Philanthropy Awards. Response to the June/July issue and subsequent email blast has led to a large response from folks selecting their favorite e-solicitation, annual giving website, and on-line giving form. The deadline for entry has been extended to August 15th. Cast your vote and by doing so be entered into a drawing for a $100 contribution to your annual fund. Winners will be announced in next month's newsletter and on-line. Full details are available at www.annualfundinc.com.

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10 Things Your Manager Wants You to Know

Source: Liz Ryan, Founder Liz Ryan Consulting

1) "Do not take it personally when I am abrupt. Bosses do not necessarily handle stress any better than anyone else does."

2) "I can not make a federal case out of every issue that is important to you. When it comes to doing battle with my own boss or other departments, please let me pick my battles on your behalf."

3) "I am not King Solomon. When you and a co-worker both want the desk next to the window, play rock-paper-scissors."

4) "Don't give me a reason to watch you like a hawk."

5) "You are the expert on how to do your job, not me. Do not be frustrated that I do not know the details. I have a different job description than you do."

6) "When you are angry with me, let me know."

7) "Do not ask me to tell you what I can not talk about. Are layoffs coming? I like you, but not enough to jeopardize my job."

8) "Bring me problems as far in advance as possible. I can help you out of a jam if I have lead time."

9) "Give me feedback on my management style but be tactful and constructive."

10)"I can help you if you goof up, but do not do anything really stupid."

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Justify Additional Telefund Staff in Large Calling Programs

Within larger calling programs the normal tenure for calling staff is 18 – 24 months. Directors typically spend the good portion of their time in the trenches of the phone center due to not enough staff. If the director is spending a great deal of time in the call center supervising shifts nightly, it detracts from their ability to lead an annual giving program within an institution. A director should visit the trenches, not live in them. Adding an additional position within the Telefund creates an infrastructure built to handle change by accomplishing a number of key objectives:

> "A director should visit the trenches, not live in them."

- It spreads the nightly shift supervision among the staff thus prolonging the onset of burnout.
- It allows for more thorough management of the systems necessary for a stable calling program, namely recruiting, retention, training, and constant evaluation/feedback.

- When there is staff change (and there will be), the remaining staff members can handle the division of labor during interim periods.
  The director of annual giving can then visit the trenches, but not reside in them, thus maintaining momentum in leading the overall program.
- When the staff change is an Assistant Director (Telefund) you have prime candidates, thus eliminating a steep learning curve and leadership having to again reside in the calling center.

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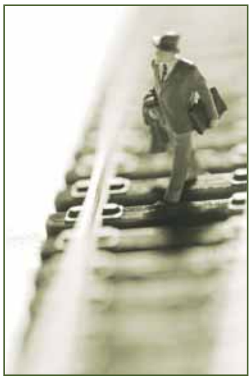
Job Hunting?

If you're job hunting, don't pad your resume with meaningless phrases such as "results-oriented." Instead, give specifics, says ResumeDoctor.com. The online consultant looked at 160,000 resumes and found that more than half used vague



BusinessWeek, July 2004
Data: ResumeDoctor.com

Percent of resumés with vague phrases

% of Resumes	Phrase
12.6	Communication Skills
7.2	Team Player
5.5	Organizational Skills
4.8	Interpersonal Skills
4.3	Driven
4.2	Detail-Oriented
3.8	Results-Oriented
3.8	Self-Motivated
3.2	Problem Solver
3.1	Highly Motivated

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