



SUBJECT ADRP Webinar March 2022 – additional information

 Is This a Good Time to Talk? Evolution of a Donor
 Calling Program

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List of research, surveys and articles mentioned in the webinar

1. Donor Voice Survey and identification of top seven drivers of donor commitment.
<https://agitator.thedonorvoice.com/national-donor-commitment-study-and-proof-of-link-between-donor-attitudes-and-behavior/>
2. Penelope Burk's blog
"Just Do It? In Fundraising, You Have To Do It Right"
17 June 2019
Details of the test of thank you calls and analysis of the Samek and Longfield study.
<https://www.burksblog.com/just-do-it-no-in-fundraising-you-have-to-do-it-right/>
3. Samek and Longfield research "Do Thank-You Calls Increase Charitable Giving?"
https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3371327
4. Bloomerang article and details of the research
"Actually, Calling Donors To Thank Them Does Make Them More Likely To Give Again (And Give More)"
<https://bloomerang.co/blog/actually-calling-donors-to-thank-them-does-make-them-more-likely-to-give-again-and-give-more/>
5. Hildy Gottlieb's article The Sound a Thank You Makes
https://www.huffpost.com/entry/the-sound-a-thank-you-makes_b_6291448

Tips and Tricks for Care Calls

The main point of care calls is to thank donors and to build a relationship with them. In that way, there is really no wrong way to do it! It is separate to an appeal. (Avoid making an ask or mention increasing their donation unless it is something the donor brings up.)

An important thing to remember is to let the donor lead the conversation.

- Some donors really like asking the student callers about their ANU experience and studies
- Other donors like reminiscing

The best way to make these calls meaningful is to do two things:

1. Ask open-ended questions
2. Listen

It helps to start the call with a thank you and a short sentence or two of how they have created impact on the ANU community, but it is not necessary. It comes in handy when the donor is not that responsive with questions and is a good place to start building a conversation.

- There are prompt suggestions in the script

Suggested topics of conversation

- What they have been up to in the past 2 years
 - o Don't dwell on the negatives associated with COVID and lockdowns though. Rather, focus on the future and positives.
- Their connection to ANU (do a bit of research beforehand on HEART or you can ask them!)
- Events they are interested in (especially if they have gone to a Celebration of Giving in the past)
- Favourite memory on campus (if they are an ANU alum)

Remember to top and tail the conversation with a Thank You!

Tips and Tricks for Calling New Donors

The main message when calling new donors is to:

1. Thank them for their gift
2. Tell them a bit about the impact they have created
3. Give them an opportunity to let us know if they have any questions or concerns

Keep in mind that this may be one of the first interactions that the donor has had with the ANU so they may be a bit wary or have extra questions.

It is important to pay attention to their gift direction (which Fund they gave to) since it gives us an idea of:

- What they are interested in or passionate about
- Their experience at ANU

So make sure you ask what their motivation for donating to that specific fund is.

- Important for us to know
- Good conversation point

There is a mindset change from calling alum in the Phone Appeal and calling new donors

- You can't assume that all these donors are alum (you can check if they are on HEART)
- It's a nice opportunity to understand the donor's connection to ANU (it might be something to talk about)

Guiding scripts for calls and voice messages

The Call – Introduction

“Hello, am I speaking with (Title) (First Name) (Surname)?”

“My name is (your name) and I am a student at the Australian National University. We are calling our donors to reconnect after a challenging year. Would now be a good time to talk?”

Or

“Hey there.

This is (your name) calling from ANU. We are calling our donor community to check-in and to thank you for your donation. Is this a good time to talk?”

Conversation – A good opening question

“How has this year been for you?”

Don't dwell too much on the past in the conversations. The difficulties of the last couple of years will naturally be a frequent topic. Don't try and stop the donors from discussing them, but stay positive and talk more about the future, plans to visit campus, attend upcoming events, etc. Whenever possible, lead the conversation forward in a positive direction.

Follow-up questions

"I see you've attended Celebration of Giving in the past, what was your favourite memory of that event?"

Ideas for topics (use your pre-call research)

- The donor's history of giving
 - These calls are not about a donor's particular gifts or history of giving
 - But you can use them to find out what each donor is interested in
 - Ex. Climate change, Indigenous affairs, Classics Museum, etc.
 - Read each donor's gift record in HEART carefully before the call to find potential subjects for discussion
- The donor's workplace and profession
- If they studied at the ANU:
 - *"I see you studied _____ when you were here, which is what I'm studying. What was your favourite thing about that course?"*
 - *"It's so lovely to hear that you still have such a warm recollection of your experience at ANU, do you still keep in touch with friends/visit campus?"*
- Are you interested in any particular advice from them?
 - *"I'm about to graduate later this year. Would you happen to have any advice for a student like me?"*

Use discretion on whether to keep this stage short or long. If the donor seems happy to talk and responds well to open-ended questions, allow the conversation to flow naturally. Listen carefully. Don't feel the need to cut off the conversation, if it's going well.

Optional

If the conversation is going well and you feel that the donor is not looking to end the call, you can cover the following optional information with them.

Updating Information

“While I have you on the phone, do you mind if I quickly confirm your contact details with us are still correct?”

Contact Details

Only check information that they have already nominated (it is already in their HEART file).

- *“Your home address is still (address details)?”*
- *“The best phone number to contact you is still (preferred number)?”*
 - *If more than one number:*
 - *“We also have another number which is (number)?”*
- *“Your email is still (email address)?”*

Communication Preferences

- *“Do you have any preferences regarding our communication?”*
 - *Give a few examples and/or suggestions:*
 - *“Are you happy with the emails you are receiving?”*
- *“Any research areas you would like to hear more about?”*
 - *“It sounds like you are interested in (e.g. cancer research, refugee scholarships...), would you like to hear more about that?”*

Try to ask:

- *“What is your preferred form of stewardship form ANU?”*
- *“Did you find this call beneficial?”*

Events

We are hoping that we will be able to invite our alumni and donor community to our campus next year, in a COVID-safe way.

- The 2022 Alumni week is being scheduled on 28 March to 2 April next year.
- If the donor is a Springbank Circle member, please note that the annual Springbank Circle long lunch will be held on Saturday 2 April 2022.
 - It will be part of Alumni week for the first time.
- We are also looking forward to organizing the Celebration of Giving event during the Spring in 2022.

Tax Receipts

A donor may ask for a tax receipt for their donations from the previous financial year. In this case, let them know that a Donor Relations Officer will call or email them to follow up. Then make sure to:

1. Mention this in the notes for this donor call;
2. Mark this donor as needing a Donor Enquiry in that column of your call sheet;
3. Ask the donor to confirm the contact details listed in their HEART profile.

Closing

Thank the donor for their time on the phone and ask if they have any questions.

You can try to bring something personal that you learned about the donor into the end of the call.

- *“Thank you for talking to me today and thank you for supporting ANU. Before I leave, is there anything else that I can help you with today?”*
- *“Please feel free to contact us, if we can assist in any way.”*

Call-Backs

We don't set call-backs. If they can't talk right now, mention that we will be in touch with a follow up email.

Voicemail

What to say when leaving a voicemail:

Hi (donor name),

My name is (your name) and I am part of the Donor Relations team at the Australian National University. We are calling our donors to reconnect after a difficult year. I'm sorry to have missed you.

Please don't hesitate to reach out if you have any questions about ANU. The ANU Donor Relations number is 02 6125 2670.

Thanks again and have a great day!