



PLANNING A PHONATHON

The Centennial Celebration for campus ministry will be a great time to call people together. Literally. During the course of the next several months you will want to be in personal contact with as many of your alums and supporters as possible. You will want to invite them to the grand 100th celebration. You will want to update them on your programs. You will want to share your vision for the next decade. You will want to ask for their important financial support. You will want to encourage their interest and participation at every level.

Certainly person to person conversation is the best way to extend an invitation to a celebration and to share information about your ministry, although for a variety of reasons that may not be possible. Direct mail and e-mail are usually seen as the fall-back options. Consider a third option: the telephone. Recent studies in the fundraising field indicate that personal contact by telephone is seen as a more personal way to communicate than electronically or by land mail. Talking with a person by phone provides a chance to hear a “real human voice” and invite questions or comments. It says to the person called that you have time to spend with them.

One of the cardinal rules of inviting gifts is that the request should be as personal as possible. And while a face-to-face visit with every potential donor isn't possible, it might be within the realm of possibility to think of contacting them in the next best way—by phone. There are some problems, of course. The overwhelming number of telemarketing calls we get these days is one. Answering machines and caller ID devices that screen calls are another. But think about it. In these days of instant, electronic communication, which is often impersonal and mechanical, wouldn't it be great to hear a cheery voice on the phone, perhaps even someone you know, inviting you to be part of something you are both very committed to

supporting. It could be a highlight of your day. Well, maybe you would at least listen through the end of the conversation.

Phonathons are usually done to raise money for the cause of the day, either annual fund or general solicitation for a larger campaign. However, in this Centennial year, a creative use for a phonathon might be to invite all of your friends, neighbors, supporters, and alums to a special celebration for your campus ministry, a worship service, or a tour of your facilities. Use it as a way to connect current students with former students. Use it as a way to say “thank you.” See it as a way to deepen your relationships with your best current and potential supporters.

The beginning of the Centennial year is a good time to consider a phonathon, in part because if you are going to do it, it will take some planning. As you will note later in this think-piece, there are details that require advanced attention. It simply isn't as easy as calling Aunt Martha on the spur of the moment to share something trivial. What you have to share is urgent, relevant, and important; therefore you will need to spend some time in careful planning.

There are generally three categories of supporters to involve in a phone conversation:

- ❖ People who are current donors, who you would like to ask for an extra gift.
- ❖ People who have not made a gift to your ministry, but might if they had more information and a personal contact.
- ❖ People who are lapsed donors, who have not given in the past two years, but who might if asked. Of course, not everyone you talk with will make a gift on the spot. Generally, 5% of people asked for the first time will contribute. If they have been or are donors, that percentage moves up to 15% to 25%. Some will ask that you send them more information—which you should be prepared to do. Some will simply say that they will send you “something,” which they might, if you send them a follow up reminder quickly.

Kim Klein, writing in an online article for *Grassroots Fundraising.org*¹, says that there is an effectiveness scale to consider when designing your phonathon. The list runs from the most to the least effective.

¹ The full article can be found on the web at www.chardonpress.com It is archived in the *Grassroots Fundraising Journal* as April, 1999, Volume 18, Number 2.

1. People who give generously to your organization call their friends to ask for a specific donation for a specific program element.
2. People who give generously to your organization allow others to call their friends and use their names to request a donation.
3. Volunteers or staff (who give money as well as time) call people who have previously given a donation and ask for another one. The volunteers do not necessarily know the people they are calling.
4. Volunteers or staff make phone calls during a scheduled phonathon, which has been publicized so people expect to be called.
5. Paid phone solicitors call people who have previously given and ask them to give again.
6. Paid phone solicitors call people who have never given, but who have been deemed good prospects,
7. Volunteers call people who have never given, but who have been deemed good prospects.
8. Poorly paid phone solicitors call people at random.
9. Poorly trained volunteers call people at random.

Usually, Klein says, phonathons are satisfied with numbers 8 and 9 and wonder why the effort wasn't successful. What you are trying to do with a phonathon is personalize the contact as much as possible, not deluge your supporters with irritating messages from unknown, untrained callers. Read over the above list carefully, moving up the scale as close to number 1 as realistically possible. How personal can you make the calls? Who is the most obvious person to make the call to particular individuals? Can you stratify your calling list, so that your most avid supporters receive the most personal attention? Who among your volunteers would be best suited to contact lapsed donors?

If you decide to conduct a phonathon, here are some things to consider:

- Set a date with enough lead time to do proper planning. Be aware of community events that might conflict, TV shows, church programs, etc. Calling mid-week from 6 to 9 seems best in most cases.
- If you are using volunteers, select them carefully and train them fully. You will need to recruit 1 volunteer for every 20 prospects. So for 200 potential donors you will need 10 callers—but invite 15 just in case some don't show up.
- Arrange for a room with several phones. Business offices often will make their phones available. Bringing in a special bank of phones for the event will add to the overhead costs.

- As an alternative to regular phones, ask people to donate cell phones with useable minutes. However, ask volunteers to come to a central location at a particular time for the phonathon. The idea of making cell phone calls from their home at their convenience might be appealing, but you lose the energy and mutual support if that becomes the option. Part of the fun of a phonathon is people doing it together.
- Have all materials ready, such as pledge card forms, pencils, prospect lists and phone numbers.
- Ask volunteers to arrive an hour beforehand, giving you at least 30 minutes for training. Practice making calls with each other to lower the anxiety level.
- Talk about phone manners.
- Provide a loose script for the caller to follow, with possible responses to donor questions. Try to anticipate these questions, so that your callers aren't left stammering into the phone. The script should contain the following:
 - ✓ An introduction
 - ✓ An explanation of the program you are seeking to fund
 - ✓ A request for a gift or a pledge, with either a suggested amount or a range of options. If possible, indicate by the person's name the amount they gave last and use that as a bench mark to continue or increase the gift.
 - ✓ Possible responses to the donor's questions or objections
 - ✓ A repeat request, if necessary
 - ✓ Verification of name, address and pledge amount
 - ✓ Words of thanks, even if no gift is given.
- Send thank you notes or follow up pledge cards with the next 48 hours. Each day of delay decreases your total by about 10%. The volunteer can write their own thank you note or attach comments to the one you are sending.
- If the line is busy, the caller should redial the number several times before giving up. A message left on an answering machine is of little value, even if the volunteer intends to call again within a few days.
- Phonathons should be fun events. Provide snacks and drinks. When the event is over you might give out prizes or appreciation gifts to your volunteers.
- Although it takes more time and money, consider letting people know in advance that you will be calling them. A note in the mail one week in advance can prepare them for your call. Then, if you are not able to reach them on the night of the phonathon, send a "sorry you weren't home when I called" note. Tell them

how wonderfully people did respond and ask that they still consider a gift by using the enclosed envelope.

With the right planning and careful execution, a phonathon will go a long way to personalize your invitation to celebrate the Centennial and support the ongoing work of your campus ministry.