

Class Agent Call Tips and Email Template 2015–16

Tips for Making a Successful Call

Preparing for the Call:

1. **Make your own gift to the Bates Fund.** You'll feel more comfortable asking your classmates to join you in supporting Bates when you have already made the commitment yourself. Please make your gift or pledge as early as possible this year.
2. **Review your assignments' giving histories.** Have they given consistently? Did they increase their gift last Reunion? The college will provide a suggested gift amount for each individual based on their previous giving history.
3. **Use the Online Tool to find up-to-date giving and contact information.**
4. **Stay informed.** The more you know about what's happening on campus, the easier the conversation will be. The Bates News site (www.bates.edu/news) is constantly updated with current stories about students, faculty and college initiatives.

Making the Contact:

1. **Identify yourself.** Make it clear that you are a fellow classmate working as a volunteer for your class fundraising effort.
2. **Get acquainted.** Chat about Bates and discuss shared interests. If you are having trouble getting the conversation going, see "Some Good Ice-Breakers" below.
3. **Listen carefully for interests, concerns, and suggestions.** If you encounter a question that you can't answer, tell your classmate that an appropriate person will get back to him/her. Then, notify Grace Bell at gbell@bates.edu or 207-755-5975, or record this in the Online Tool and flag for staff follow-up.
4. **Ask directly.** Ask your classmate to join you in supporting Bates this year. Ask for the amount listed in the Online Tool.
 - a. If the answer is yes, direct your classmates to the online giving form: www.bates.edu/give.
 - b. If that amount is too much, emphasize participation. Let him/her know that their gift, whatever the size, truly matters to Bates.
 - c. If they would like to pledge for this year and/or future years, ask how much they would like to pledge and record it in the Online Tool.
5. **Say thank you!** Say thank you no matter the outcome of the call. Every call is a success, as it provides one additional point of contact and involvement with the college.

Some Good Ice-Breakers:

Having trouble getting the conversation going? Here are some good open-ended questions to ask if this is a first-time call!

- What have you heard about Bates lately?
- Do you attend Bates events?
- Have you been to campus recently? Did you enjoy Reunion?
- Are you in touch with classmates?

- Did any of your children/grandchildren go to Bates?
- Where you live?
- What was your path post-Bates?
- When did you meet your spouse/partner?
- Where else have you lived? Which cities did you prefer?
- Do you work, volunteer, or serve on any boards?
- How does Bates fit into your list of charitable priorities?

Responses to Common Questions and Objections:

Sometimes classmates may have questions or comments about their gifts to Bates. Here are some of the more common inquiries and suggestions on how to respond. Remember, it is not your responsibility to know all of the answers about Bates and fundraising. If someone asks a question that you don't know how to answer, simply respond with, "I'm not sure. I'll ask the college and either I or someone from Bates will get back to you with an answer."

Question/Objection	Possible Response
"I already gave this year."	<p><i>"Have you given since July 1, 2015? The Bates fiscal year runs from July 1, 2015 to June 30, 2016. Would you consider a gift of \$<ask amount> this fiscal year?"</i></p> <p>If your classmate insists that he/she has given, thank him/her for their support and make a note about your conversation.</p>
"I always make my gift in June. How can I avoid receiving so many letters?"	<p><i>"Bates sends mail several times during the year since they have no way of knowing when a donor will make a gift. An excellent way to avoid receiving any additional solicitations is to pledge early in the giving year. By pledging now, you can also indicate when you'd like to be reminded about your pledge."</i></p>
"I want to think it over."	<p><i>"That's great. I appreciate your interest in supporting our class and the college. If there is a minimum amount you are considering, I could put you down for a specific amount. By making a specific pledge now, you won't receive appeal letters from Bates for the rest of the Fund year, only one or two pledge reminders."</i></p> <p>If your classmate would still like more time to consider the amount for which you are asking, ask if there is a specific day you might follow up with a phone call.</p>
"Are you crazy? I can't afford it because x, y, z"	<p><i>"I can understand why you might feel that way. It's been a difficult economic time and I hope things improve. The college is still doing great work and is committed to providing an outstanding education; it can't do this without resources, so we must continue to ask. You've been very supportive of Bates in the past and we hope you'll renew your support with a gift that is comfortable for you. Would you consider a gift of <lower amount>?"</i></p>
"I don't want to give money with no idea about where it is going."	<p><i>"Gifts to the Bates Fund support many things on campus, including scholarships, athletics, and faculty resources. They allow Bates to address underfunded, unplanned, unmet, or emergency needs. New challenges</i></p>

Question/Objection	Possible Response
	<i>and opportunities are constantly presenting themselves and our unrestricted gifts give Bates the flexibility to respond."</i>
"Send me something in the mail."	<p><i>"Is there any specific information that you would like to have about the college?"</i></p> <p>This question usually opens up the conversation and allows you to continue with the appeal over the phone. If your classmate insists on receiving something in the mail, tell him/her that you will mail a gift reply envelope and any information he/she has requested.</p>

Email Template

If you are unable to reach a classmate by phone, you are welcome to reach out via email. Here is an email template to help you get started!

Hi, XXX.

I hope this email finds you well.

I'm writing to ask you to renew your support this year. Making a gift to the college is a great way to honor your Bates experience. Your gift helps ensure that today's students have access to the best possible liberal arts education. Contributions of any size count toward our class participation — this year we are aiming for XX%.

I hope you will join me in supporting our class this year. To contribute, please visit www.bates.edu/give. Feel free to contact me with questions about our class fundraising goals or Bates news in general. Thank you so much for your support!

Sincerely,

XXX