

FUNDRAISING MANAGEMENT

# DEVELOPING PHONATHON CALLERS WITH CHALLENGE AND SUPPORT



EMAIL



DIRECT MAIL



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DATA ENRICHMENT



CROWDFUNDING

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# STUDENT CALLER SURVEY:

## SURVEY RESULTS FROM STUDENT CALLERS IN OUR ON-SITE MANAGED PROGRAMS

### INTRODUCTION

In October 2014, RuffaloCODY offered a survey to student callers working in our on-site managed programs at over 100 college and university campuses in the US, Canada, and Australia. 714 students responded, and about half (49%) of the callers were returning callers (those with more than one semester of experience). The remainder of the student respondents were in their first semester of calling.

Survey questions covered why students chose to work for the phonathon or telefund, what they found difficult about the position, what they enjoyed about the position, as well as how phonathon impacts their interest in future giving and a potential fundraising career. In addition to the survey we completed, we conducted confidential interviews with callers to further explore the student experience.

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### WHY WORK FOR THE PHONATHON?

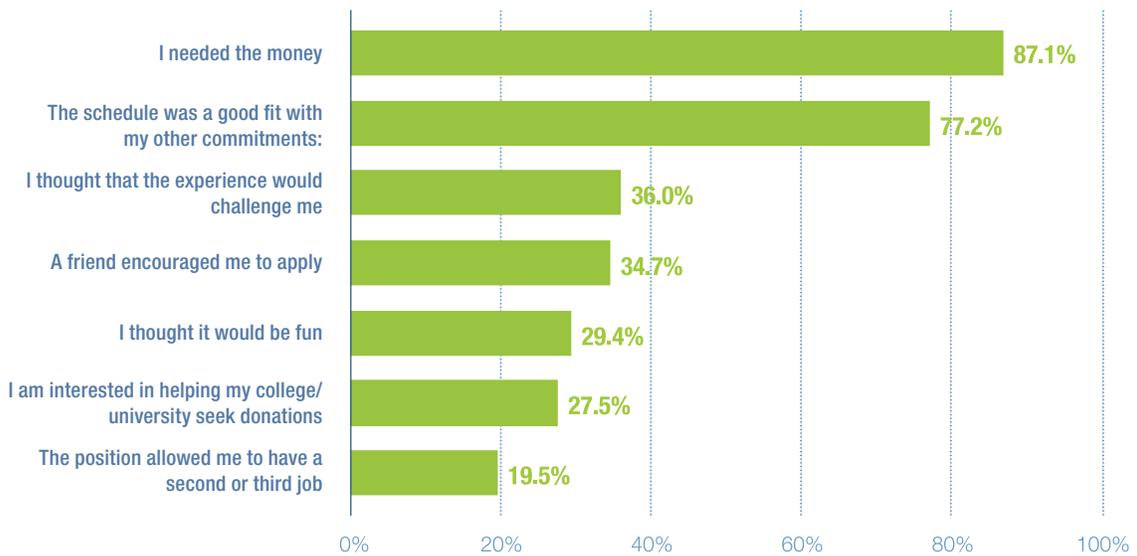
The most common reason that students reported taking a position as a student caller was the money, both in the survey and in interviews we completed. The excitement of the job and flexibility of hours were also big factors.

“I like being able to talk with people. Most other jobs on campus you’re just sitting around doing nothing...I get to talk with someone different every night,” said David, a junior returning caller. He also related a great story that an alumnus recently told him on the phone about the local community. “I wouldn’t hear things like that in another job. We’ve also had callers get advice and even job offers, there is no other job like that.”

\*Students names changed throughout the white paper to protect their identity.

“It’s not too many hours per week, so it gives us a great opportunity to stay focused on school but make some extra money,” said Stephen, a new caller this semester at a Midwest public university. “I think it’s awesome. With my major in business, it’s a really valuable thing. Learning how to accept no and build on that is a very important learning experience.”

**Why did you apply for and accept the position? (please check all that apply)**



**WHAT DOES THIS MEAN?**

Compensation will be key in continuing to recruit student callers, but there is a significant impact of callers recruiting friends and the flexibility of work hours a calling position can offer. In addition, the interest in a challenging position and helping the institution are nearly as significant to students.

**WHAT TO DO?**

Begin by making sure that your student wage is competitive with other positions that are available to students both on campus and near campus. Adding an extra dime or quarter to the hourly wage might be the difference between a successful recruitment effort and a failed one.

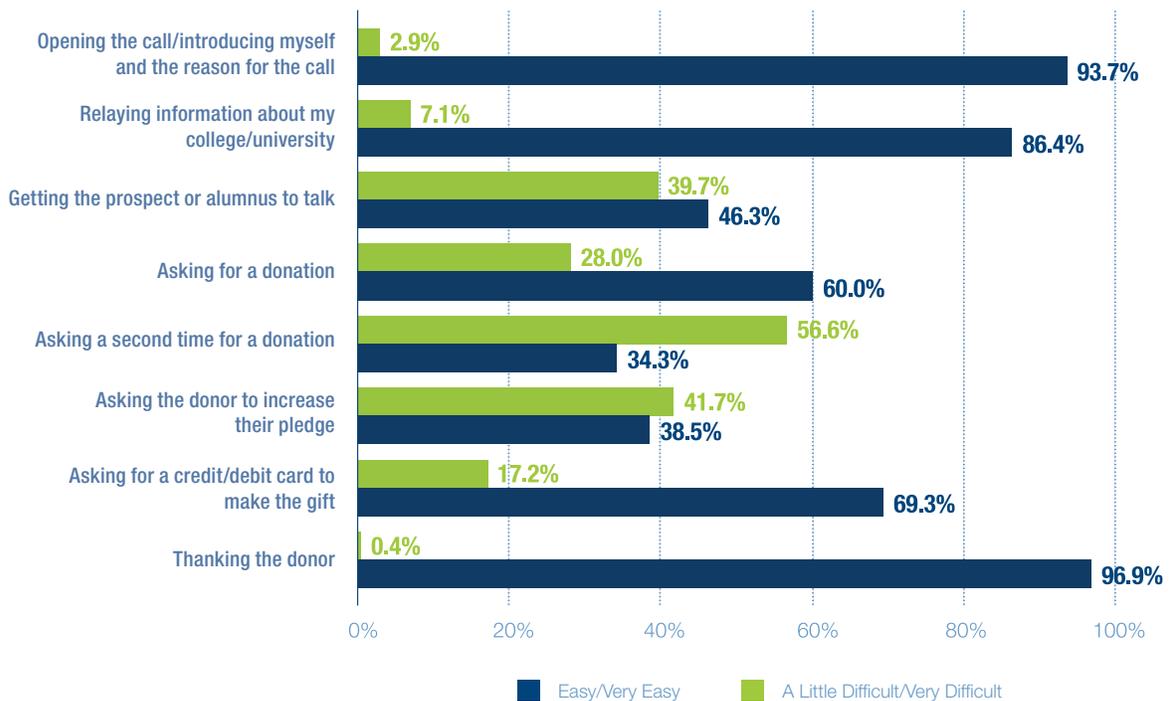
Advertise the compensation, but make sure to also note the additional benefits as well. Be sure to mention

benefits like a flexible schedule, the opportunity to build an attractive resume, and the opportunity to help the institution. These are all motivating factors in the student recruitment process.

## CHALLENGE AND SUPPORT

We asked students what they found most difficult about being a phonathon caller.

### How do you feel about these aspects of making a phonathon call to a potential donor in regard to how difficult you feel they are?

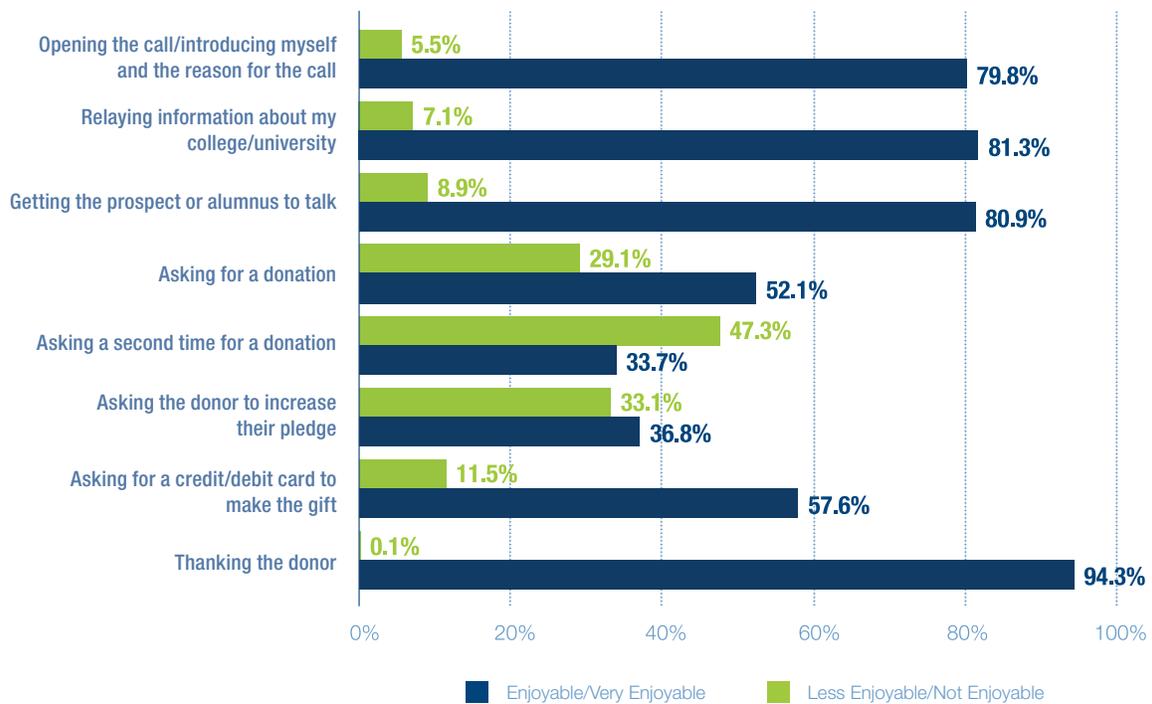


Opening the call, exchanging information and thanking the donor, commonly placed in the “rapport building” category of the phonathon call, were reported as relatively easy by students. It was interesting to note that while the majority of students found it relatively easy to ask for a donation, their feelings flipped for the second request.

“There are a lot of situations where it is extremely difficult to ask a second or third time. It does work a lot of times, so I understand the value of it,” said Angela, a junior caller at a private institution in the South. Angela reported that it was very difficult to ask again when the donor made an objection based on their personal situation, but she had “no problem at all” continuing to ask if the donor had an issue with the university.

We also asked which of these aspects of a call they most enjoy when they succeed at them.

**How do you feel about these aspects of making a phonathon call to a potential donor in regard to how much you enjoy them when you are successful?**



It’s great to see that students can find asking enjoyable when they succeed. It’s also clear that the difficult aspects of a good phonathon call can challenge students. A recurring theme in interviews is that the phonathon job is the toughest job on campus. “There is an impression on campus that it’s a hard job,” said a returning caller. “It was not a job where I knew honestly what I was getting into. It can be very challenging. But I see a lot of value in what we do, for me personally, for the university, and for donors,” said another student.

Encouraging student callers to engage donors but also make sure that they complete a quality ask seems to be key.

*I ask my callers to be politely persistent. I try to get them to buy into the cause and make it personal. If they have a scholarship or know someone who does, the caller should mention this. This is the primary difference with phonathon fundraising. The students are more compelling than a direct mail piece because they can tell their personal story and find a commonality with the donor.*

**— Forest McKenzie, Call Center Manager at the University of South Dakota**

“I think it’s really important to value people as people...let them be heard and feel valued,” said one caller. It’s great to hear that student callers embrace a donor-centric fundraising model in the way our industry has started to in recent years.

In 1967, Nevitt Sanford introduced the concept of balancing “challenge and support” to provide an environment that maximizes student learning, personal development, and success. This concept remains an important part of modern student development theories. Excellent call centers provide significant support to students through training, coaching, games, and prizes that reward success. We also ask students to do one of the most challenging jobs on campus, a job that includes facing rejection, overcoming obstacles, and being actively coached to improve.

### WHAT DOES THIS MEAN?

Students find talking with potential alumni enjoyable, and the specific best practices we ask of them when seeking pledges can be challenging. We were surprised by two responses. First, while many programs focus heavily on scripts, students really enjoy unscripted interaction with the donor. Second, asking for credit cards is less difficult than we may think. With the increased costs in your shop for mailing pledge cards, maximizing secure credit card gifts on the phone is key.

We must provide a supportive environment for student fundraisers to approach this challenging task and

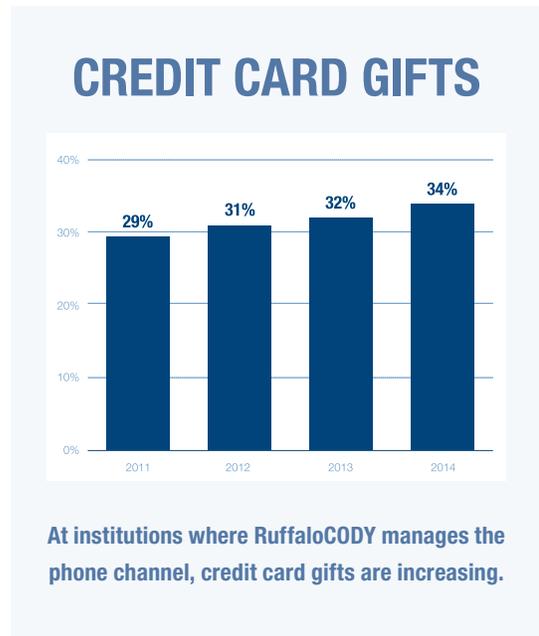
to overcome obstacles and rejection as they seek pledges on the phone. We must also continue to challenge student callers to meet our calling goals and in the right environment, they can really enjoy these challenges.

### WHAT TO DO?

Recruitment and training need to focus heavily on conversation skills. Student callers find that multiple asks for donations and building relationships can be both the most challenging and most rewarding aspects of their job respectively. What makes the difference is when the prospect responds positively by engaging with the caller in conversation.

Student fundraisers need to be prepared to discuss a wide variety of topics in order to bring a prospect out of their shell, including campus sports and academics. It is management’s job to make sure they have enough conversational material, so be sure to update the talking points.

Finally, do not shy away from telling students that part of the job will be difficult. Transparency is important. Explain why you want them to make multiple asks and include statistics on the percentage of pledges received on the second or third ask. Invest heavily in strong coaching and ongoing training, not just results monitoring.

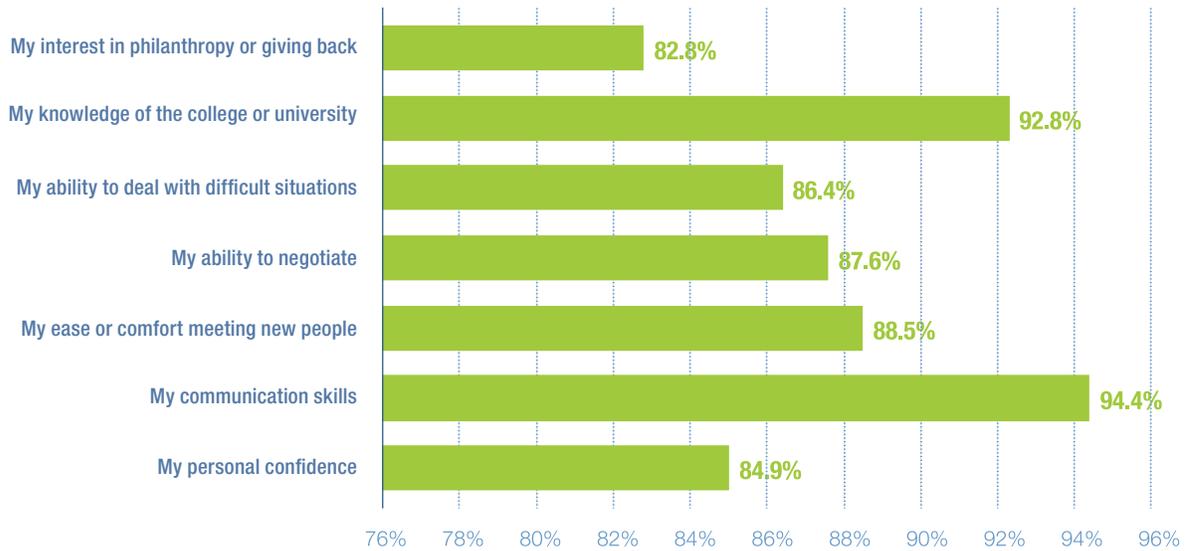


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## A GROWTH EXPERIENCE

Considering the challenges of the position, we asked callers how they had grown since they started the position. Here’s what they said:

**Because of my experience as a phonathon caller, I feel that I have seen improvement/growth in (check all that apply):**



**WHAT DOES THIS MEAN?**

As one of the toughest jobs on campus, the phonathon position has a great opportunity to help students grow personally and professionally.

**WHAT TO DO?**

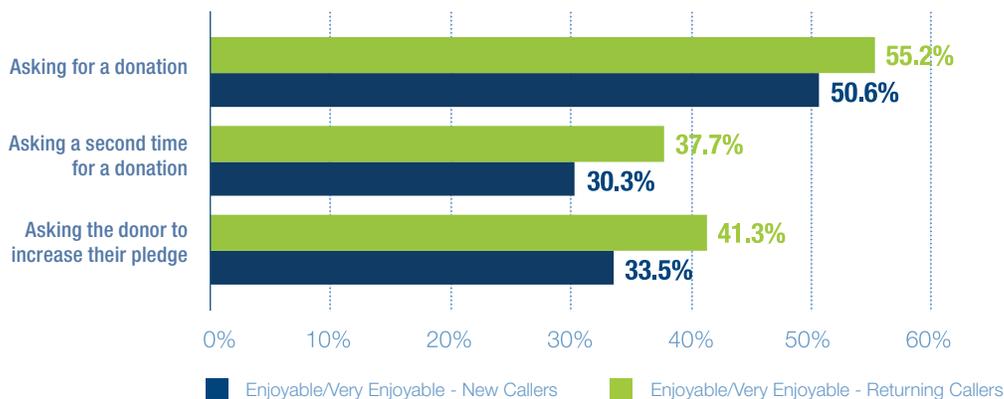
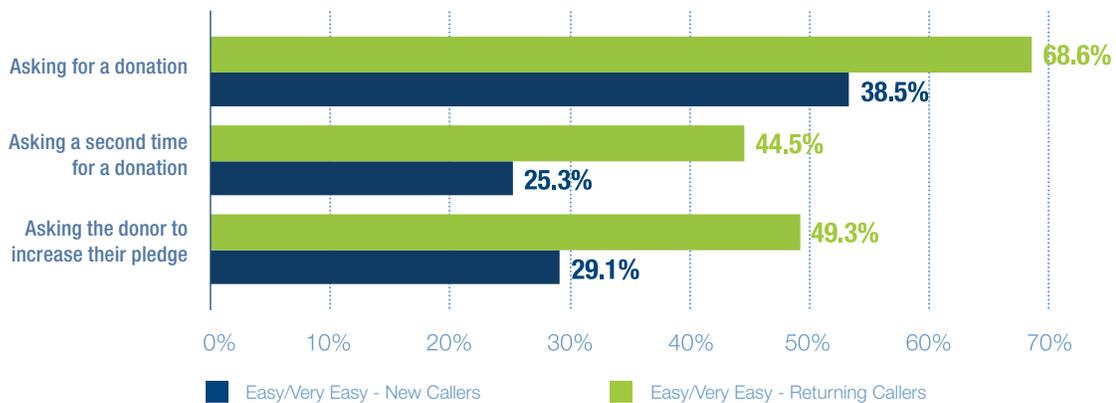
Connect current and prospective student employees with former callers that have successfully transitioned into full-time employment after graduation. This can be as easy as inviting a trusted former caller to speak at the beginning of the calling shift. Current students will benefit from hearing how the phonathon position helped the alum after life on campus. Student fundraisers practice a unique set of desirable skills that potential employers are looking for, and the experience they gain from the phonathon will set them apart from their competition when it comes to job hunting.

When you talk about your phonathon or telefund on campus, be sure to mention that it also has an educational and student development benefit.

## EXPERIENCE IS IMPORTANT

When you break down the student responses based on experience, an interesting trend develops. Returning callers reported a higher rate of ease in all areas, particularly with more difficult areas of a call. Returning callers had a higher rate of enjoyment when successful in three of the most difficult areas of the call: asking, asking a second time, and asking for an increase in pledge (upgrade). Here's how ease and enjoyment broke down based on experience for three of the hardest parts of a call:

### How do you feel about these aspects of making a phonathon call to a potential donor in regard to how difficult and enjoyable you feel they are?



It's great to see that as students build experience, their enjoyment with even the more difficult challenges increases. The culture of a call center and how likely students are to return was a recurring theme in interviews. "Our caller retention rate is high, not only because the callers need the money, but because they have met incredible friends here," one center manager said. "We try to create a team environment that is fun, encouraging, and uplifting."

*I was a little nervous when they put me in the leadership pool for the first time, asking people for thousands of dollars, but after a while, you realize that these are just people with a higher capacity and all you have to do is talk with them. It's no different.*

— Sam, junior at a private institution and lead caller

## WHAT DOES THIS MEAN?

Students who enjoy asking people for money (even a second time) and negotiating continue in the phonathon position. They also get a lot of enjoyment out of these tough tasks when successful. Retaining successful callers is likely one of your best possible returns on investment.

## WHAT TO DO?

Make sure you have a "retention budget" of both time and resources to keep callers on staff between semesters. It can be difficult to get callers back into the program after a summer vacation, so communicate frequently with callers that have left campus while they are away. Share stories about the program's final results and relay plans for the upcoming year. When it comes time to begin calling in the fall, remind them of how valuable they are to the program's success. Offering a "returning caller bonus" for students that work a specific number of shifts before a certain date never hurts!

## FUTURE GIVERS AND FUTURE FUNDRAISERS

Student callers report an increased interest in giving back to their alma mater. 94% of students who responded to the question indicated that they were more likely to give as an alumnus themselves.

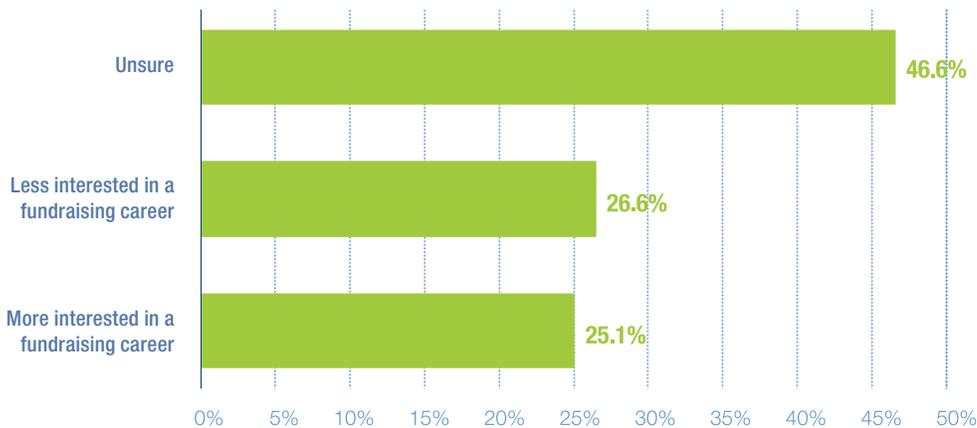
**94%**

OF CALLERS REPORT AN INCREASED INTEREST IN GIVING BACK TO THEIR ALMA MATER

“I understand how important it is, both for the people who are calling and for the organization. It has softened my heart toward giving to areas that I’m not already involved in,” said one student.

10.5% of students responding to the survey indicated that an interest in a fundraising career influenced them to apply and accept a phonathon position. Given the relative size of most calling teams, this is encouraging for interest in our profession. We also asked about how phonathon contributes to interest in a fundraising career.

### Based on my phonathon experience, I am:



It would have been great to see more students growing their interest in a fundraising career, but we started to think about phonathon like an internship for students considering a career in giving. Because phonathon work involves doing the actual asking, it could be a very powerful discernment tool for students to decide

whether they really want to do that type of work. The active experience is a powerful self-discovery tool in one of the toughest jobs on campus.

### WHAT DOES THIS MEAN?

Becoming the “asker” has a clear impact on increasing students’ opinions about giving back themselves. Phonathon also seems to be a powerful tool in helping potential future fundraisers decide if that path is right for them.

### WHAT TO DO?

Make sure you are looking at your call center as a source of potential future gift officers. About a quarter of callers are interested in doing a fundraising job someday. Identify ideal candidates and nourish their interest by exposing them to additional opportunities as a student.

Consider involving your student staff in student giving efforts on campus. Creating a competition that inspires callers to involve their friends in making asks on campus is a great way to broaden the scope of impact.



## CONCLUSION

This survey tells us that students find being a fundraiser on the phone challenging, and “one of the toughest jobs on campus.” They also gain significant enjoyment out of these challenges. Experience is crucial in helping callers decide if this is the type of work they really want to do, and returning callers find even the more difficult parts of a good call easier.

We’ve also discovered that phonathon calling, and becoming the “asker,” has a powerful effect on students’ interest in giving back in the future. Along with this, a significant number of our callers are actually interested in joining us as professional fundraisers in the future.

As phonathon callers enter the alumni base after graduation, we should watch for them to become further leaders and ambassadors for giving.

For questions about the survey, methodology, or for media inquiries, email Brian Gawor, CFRE at [Brian.Gawor@RuffaloCODY.com](mailto:Brian.Gawor@RuffaloCODY.com).

To see the survey, visit [www.ruffalocody.com/callersurvey](http://www.ruffalocody.com/callersurvey)

To see more student quotes and commentary at our fundraising blog, visit [www.ruffalocody.com/fm-blog](http://www.ruffalocody.com/fm-blog).

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## WRITTEN BY BRIAN GAWOR, CFRE



Brian Gawor serves as Associate Vice President within RuffaloCODY's Fundraising Management division. Brian's focus is research and strategy to help propel the results of clients, specifically those institutions using RuffaloCODY's phonathon software.

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## ABOUT RUFFALOCODY

At RuffaloCODY, we feel fortunate to partner with hundreds of institutions and nonprofit organizations throughout the world. Our team of fundraising professionals includes managers, trainers, writers, graphic designers, and data analysts, all with the knowledge and expertise necessary to ensure that your program runs smoothly. We pride ourselves on building relationships while achieving the kind of results that will make your fundraising program successful.

To learn about the fundraising solutions we provide, visit [www.ruffalocody.com/fundraising](http://www.ruffalocody.com/fundraising).

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