

**Colby College**  
**Office of Annual Giving**

*Sample 25th Anniversary Script*

**Summary of Script:**

- Introduce yourself and the purpose of your call
- Talk about the 25th Anniversary Program
- Make the Colby Fund ask – remember to ask for a *specific commitment*
- Schedule a follow-up call to allow your classmate time to consider your request
- During the second call, close the Colby Fund commitment
- Introduce the capital and endowment gift
- Thank your classmate for participating

Some notes about the script...

This script is designed to serve as a general guideline of what your telephone call might sound like and what you might wish to say to the individuals you call. It is not intended to be read nor does it attempt to address every eventuality you might encounter during your calls. The script assumes that you will be calling each classmate twice. You may meet with great success and finish the entire “ask” in one call or it may take more than two calls before your classmate is comfortable making a commitment or commitments to Colby. The script is intended to make you more comfortable making your calls. Many callers choose to take the essence of the script and write it out in their own words prior to making their calls. If you encounter difficulties – questions you can’t answer, requests you can’t fulfill, etc. – please don’t hesitate to call your Committee member, Anniversary Gift Chair, or Lisa Burton at the College for assistance.

**CONFIDENTIALITY STATEMENT**

*Because Anniversary Agents have access to donor information, it is important for each Agent to treat this information with appropriate regard for its confidential and sensitive nature. Agents should not reveal to the donor or to other classmates the scope of their knowledge of an individual’s giving to the College and they should caution any member of their class who may assist them in their fund raising of the need to respect the privacy of donors. Colby has been extremely fortunate to have Agents who are very discreet with regard to the information they receive from the College.*

**MAKING SUCCESSFUL PHONE CALLS**

Make your own commitment first – Your calls will be much easier if you can say, “I’ve made a commitment to Colby, will you join me?”

Review what you would like to say – Most of the answers to the questions you will be asked can be found in this document. Familiarizing yourself with the materials is important, but more important is the personal contact you have with your classmates. If you are asked something you don’t know, let

your classmate know that you will find out from someone at the College and get back to them—and make sure you follow up.

Think about why you have volunteered to help – The most important few moments you can take prior to making your calls is to ask yourself the question, “Why did I volunteer to help with fund raising for the Colby?” Once you think of why you have decided to help, you will have a stronger sense of mission and purpose and will be more confident making your calls. You need not apologize for making calls on behalf of Colby. It is an institution deserving of your support and time.

Know your case – Gifts to the Colby Fund provide financial aid for deserving students as well as resources for faculty, academic program, and library support. Colby relies on annual gifts and endowment income to fund 25 percent of its annual budget.

Know your classmates – Before calling each classmate, review his or her giving history and current ask amount in MVP. Notice where he or she lives. Try to recall if you have anything in common with him or her. If you have a yearbook, review his or her entry to look for common experiences.

*MVP contains home and business contact information for each individual or couple as well as his and/or her recent giving information. If MVP contains no telephone number, it is because it is not on record at the College and attempts to secure the number have been unsuccessful. [If you have the telephone number yourself, please forward it to Colby via your Colby staff person.](#)*

## **MAKING YOUR CALLS**

Speak directly to the prospect – make sure you introduce yourself as a Colby classmate so they know you are not a telemarketer. If you reached them at a bad time, make an appointment to call them back when it is most convenient for them.

Be enthusiastic – you are calling on behalf of a great school and a great class – yours!

### *Introduction*

“Hello, this is \_\_\_\_\_ calling.” (If you know the person you are calling well, take a moment to catch up.

If you don’t know the person well, try to make a connection – we lived in the same dorm, were in the same math class, etc). “As you know, our 25th reunion is approaching. I have volunteered to help raise money for the Colby Fund in honor of our 25<sup>th</sup> Reunion.”

### **Making the Colby Fund Ask**

“I hope you received a letter recently from our Gift Chair NAME sharing more about our reunion plans. I wanted to follow up on that letter asking you to consider making a special commitment of \$\_\_\_\_\_ (*ask amount appears at the top left of the MVP screen or top of the calling sheet in bold*) to the Colby Fund in honor of our reunion.”

*After you make the ask, allow your classmate time to respond. It will be very tempting to fill the silence while you are waiting. Please resist this temptation and wait. **Silence is your friend!***

## **Making the Colby Fund Ask for a Multi-Year Commitments or President's Leadership Societies**

*Note: Classmates may make a three-year commitment to the Colby Fund at the President's Club level (\$1,500) or higher per year. Please do not encourage multi-year commitments below this amount, but do encourage your classmate to make a one-year commitment.*

"I hope you received a letter recently from NAME OF CHAIR asking you to consider making a Colby Fund commitment of \$\_\_\_\_\_ (*highlighted amount on calling sheet*) in honor of our 25th Anniversary. This commitment is payable over \_\_\_\_\_ (*1 year for commitments up to \$3,000 or 3 years for commitments of \$4,500 more.*) and will help our class reach its Colby Fund goals of \$X this year, \$X next year and \$X during our 25th Anniversary, for a total three-year Colby Fund gift of \$X"

*Pause after asking to give your classmate time to respond. Resist the temptation to fill the silence and allow him or her to speak first.*

*If he or she agrees.*

"Thank you very much for your time and for your commitment to the Colby Fund, our class and Colby! I will notify NAME OF CHAIR and the College of your commitment and you will receive follow-up materials shortly. I look forward to talking with you again *date and time* about possibly making a special gift in honor of our 25th."

"In addition to your Colby Fund support, we hope that everyone will be able to consider a capital or endowment gift (such as an endowed scholarship fund). There are a number of different ways to make capital and endowment gifts – a brochure that outlines these various methods was mailed to you recently with a letter about our Anniversary Gift effort. While your Colby Fund gift will help our class reach its three-year Colby Fund goal of \$X, a capital or endowment gift will help the class reach its overall goal of \$X million."

**If interested.** "Since this is a considerable commitment to make, perhaps we should schedule another time to discuss your interests. How about *suggest date and time*?"

**If not interested.** "Thank you very much for participating in the Colby Fund in honor of our anniversary. It will be terrific to count you in our class totals."

*If he or she is uncertain.*

*Note: Attempting to get a definite response from an undecided classmate will almost always result in a much lower commitment than that you are seeking. It is better to call back at another time if you feel your classmate will thoughtfully consider your request.*

"I understand that this is a considerable commitment to make and I don't want you to give me an answer today. I do ask that you give this request your serious consideration.

Our goals for Colby Fund participation for each of the three years are X%, X%, and X%.

In addition to seeking maximum participation, we are asking classmates to make a special stretch commitment to the Colby Fund in honor of our 25th Anniversary. "

If ask amount is \$4,500 or more include text below:

- By making a multi-year commitment, you will help deserving students as well as the faculty of Colby. In addition:
- You will receive full credit for the total amount of your commitment.
- You will receive no additional appeals until your commitment is paid.
- You can honor your commitment in annual, semi-annual, quarterly or monthly installments – charged directly to your credit card, if you wish.
- Our class will receive full credit for the total amount of your commitment.
- Our class will be certain to be able to count you as a participant each year.”

“If you would like some time to consider our request, I would be happy to call you back in a week or two. I have a personal goal to complete all my calls by DATE and would appreciate it if I could talk with you suggest a date and time. If you need more information about how you might make and honor a commitment to the Colby Fund (*for questions about gifts of securities, matching gifts, credit card installments, etc.*) I can ask a member of the Colby development staff to contact you. I also hope that between now and the time we speak again you’ll have a few moments to also consider our class legacy to Colby and what you might be able to do to help make our 25th Anniversary Gift truly spectacular.”

“Thank you very much for your time and for your consideration of my request. I look forward to talking with you again *date and time* about the Colby Fund and about possibly making a special gift in honor of our 25th as well.”

Not interested in Colby Fund, but wants to make a capital gift.

“Our class participation is based each year on the number of classmates who give to the Colby Fund. While I understand that you are not inclined to make a stretch commitment to the Colby Fund, I hope you will make a small gift so that we may count you in the participation totals. I look forward to talking with you again *date and time* about possibly making a special gift in honor of our 25th.”

If he or she is not interested in making a gift.

“Our 25th is our best opportunity to post a class record-setting participation rate and to make a truly spectacular gift to help Colby’s students and faculty. Regardless of the amount of your gift, I hope you’ll make a contribution so that we can count you as a donor.”

## 25TH ANNIVERSARY GIFT CALL #2

### Colby Fund Gift (Multi-year or one year commitment)

“It was great to speak with you *reference first conversation*. I hope you have had some time between then and now to consider supporting our 25th Anniversary effort by making a commitment to the Colby Fund of \$\_\_\_\_\_ (and/or capital gift).

*Silence is your friend!*

*If yes to Colby Fund gift.*

“Thank you very much for your time and for your commitment to our class and to Colby! I look forward to seeing you at our 25<sup>th</sup>-if not sooner!”

*If no to Colby Fund gift.*

*If the classmate is unable to respond favorably to the ask, stress the importance of participation during each year of the three year campaign.*

### Capital Gift

“It was great to speak with you *reference first conversation*. I am really excited that you are interested in talking about the possibility of making a capital or endowment gift to Colby. There are a number of different ways to make these gifts.

*If yes, still interested.*

Find out the details of what he/she might be interested in supporting and any giving vehicle that he/she might be considering (securities, real estate, bequest, etc.) Report information back to your Colby staff member.

*If no.*

“Thank you for your Colby Fund commitment and for considering an additional gift. If you change your mind or your circumstances change and you would like to continue a conversation about capital and endowment giving, please feel free to contact me or Colby directly at 800-311-3678.”

### **Tactics on Increasing a Gift**

Please keep in mind that the Colby Fund needs to grow at an annual rate of 5-7 percent in order to meet the annual operating budget. To keep up with this demand, Colby needs to have all its alumni continuing to increase his/her gift size. Not only is the objective to get a classmate to make a pledge to you, but to hopefully increase it from the prior year. There are several methods:

*Reunion* – Your reunion is an obvious reason to ask classmates to make special or “stretch” gifts. Many alumni are often asked to double their normal gift during this period.

*Campaign* – The Reaching the World campaign is an opportunity for everybody to contribute to the campaign. It will be an incentive in appeal letters for alumni to make special or “stretch” gifts and should be widely talked about while securing gifts and pledges.

*Matching Gifts* – These are counted towards a donor’s “out-of-pocket” amount for gift club recognition and can be used again for incentives to move people to higher levels. Additionally, matching gifts provide more money to Colby’s bottom line.

*Class Goals and Reunion Records* – Can be used to leverage gifts to reach new dollar and participation levels.