2016 BUCKNELL UNIVERSITY SUMMER PHONATHON CONFERENCE

Monday, July 11

8:30—10:00  REGISTRATION, WELCOME & BREAKFAST
Country Cupboard, Slifer Room
101 Hafer Road, Lewisburg
Breakfast Sponsored by Ruffalo Noel Levitz

10:00—10:30  SHUTTLE TRANSPORT TO CAMPUS

10:30—11:15  INCENTIVIZING, MOTIVATING, & RETAINING CALLERS
Clinton Crow, Crow Fundraising Concepts
Academic West, Room 108

11:15—12:00 GOING SCRIPTLESS: BYO SCRIPT!  OR  EXTREME MAKEOVER: PHONATHON EDITION
Angie Myers, Bucknell University
Academic West, Room 112
Joe Volturo, Lehigh University
Academic West, Room 116

12:00—1:00  LUNCH
Deli Sandwiches & Salad
MacDonald Commons, South Apartments Complex

1:15—2:15  INTERVIEWING & HIRING QUALITY CALLERS  OR  KEEPING CALLERS CONTAINED
Natosha Kreamer, Bucknell University
Ellice Moore, Bucknell University
Academic West, Room 108
Academic West, Room 116

2:15—2:45  BREAK & SNACKS
Events Lounge, Academic West

2:45—3:30  MANUAL ORGANIZATION  OR  PHONATHON & CHALLENGE DAY
Emily Myers, Mount Saint Mary’s University
Amanda Walck, Albright College
Academic West, Room 116
Academic West, Room 112

3:45—4:30  CAMPUS & CALLING ROOM TOUR
We’ll all jump in the shuttles and take a brief tour of campus. We will end at Cooley Hall so everyone can enter Bucknell’s Student Calling Room to get ideas for decorations, motivation techniques, and setup.

4:30—5:00  SHUTTLE TRANSPORT TO EVENING EVENT

5:00—7:00  DINNER & WINE TASTING EVENT
Spyglass Ridge Winery
105 Carroll Road, Sunbury

7:00—7:30  SHUTTLE TRANSPORT TO HOTELS
2016 BUCKNELL UNIVERSITY SUMMER PHONATHON

8:30—9:30 BREAKFAST
Country Cupboard, Slifer Room
101 Hafer Road, Lewisburg
Breakfast Sponsored by Ruffalo Noel Levitz

9:30—10:00 SHUTTLE TRANSPORT TO CAMPUS

10:00—11:30 NEW CALLER TRAINING
Natosha Kreamer, Bucknell University
Academic West, Room 108

11:30—12:30 LUNCH
Taco Buffet
MacDonald Commons, South Apartments Complex
Lunch & Discussion Sponsored by Wilson-Bennett Technology

12:30—1:30 SEGMENTATION TECHNIQUES OR PAPER TO AUTOMATION: HOW TO TAKE THE PLUNGE
Angie Myers, Bucknell University
Chris Short, Wilson-Bennett Technology
Academic West, Room 112
Academic West, Room 116

1:30—2:00 A WORD FROM OUR SPONSOR: RNL TRAINING & PRODUCT Q&A
Sarah Patterson, Ruffalo Noel Levitz
Academic West, Room 108

2:00—2:30 KEEPING CALLERS CONTAINED* OR GOING SCRIPTLESS: BYO SCRIPT!*
Ellice Moore, Bucknell University
Angie Myers, Bucknell University
Academic West, Room 116
Academic West, Room 112

2:30—2:45 BREAK & SNACKS
Events Lounge, Academic West

2:45—3:45 QUALITY CONTROL
Natosha Kreamer, Bucknell University
Clint Tom, Crow Fundraising Concepts
Or
DATA ANALYSIS
Academic West, Room 112
Academic West, Room 116

3:45—4:00 SHUTTLE TRANSPORT TO HOTEL ROOMS

6:00—8:00 OPTIONAL DINNER
Towne Tavern
600 Market St., Lewisburg
You don’t have to join us for dinner, but we hope you will! Your choice of the following meals are included in your registration fee: Black Diamond Steak, Dragon Chicken, Old Bay Shrimp, or Mediterranean Pasta. Limited to the first 50 to sign up at dinner on Monday.

*Repeat sessions from day 1 — “express versions” with less discussion
2016 Bucknell University Summer Phonathon Conference

8:30—9:30 BREAKFAST
Country Cupboard, Slifer Room
101 Hafer Road, Lewisburg
Breakfast sponsored by Ruffalo Noel Levitz

9:30—10:30 THE FUTURE OF PHONE & YOUR CALLERS’ FUTURES
Rory Channer, Ruffalo Noel Levitz
Country Cupboard, Slifer Room

10:30—11:30 OPEN FORUM
An opportunity for you to ask questions that have been left unanswered.
Country Cupboard, Slifer Room

11:30—11:45 ENDING REMARKS

Lunch on your own

THANK YOU TO OUR SPONSORS

Breakfast each day sponsored by RUFFALO NOEL LEVITZ

AND

Tuesday’s lunch sponsored by Wilson-Bennett Technology Inc.
<table>
<thead>
<tr>
<th>INCENTIVIZING, MOTIVATING, AND RETAINING CALLERS</th>
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<tbody>
<tr>
<td>Clinton Crow, Crow Fundraising Concepts</td>
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<td>In this presentation, Clinton will outline ways to build quality relationships with your callers to make them feel respected and appreciated while setting clear and consistent boundaries. He will also talk about motivating students during the calling session and ways to retain and incentivize them.</td>
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<td>In this interactive workshop, Angie will outline how she took Bucknell’s Student Calling Program from a script-dependent program to a scriptless program. By bringing your own script, Angie will walk you through how to transition your program away from scripts for good!</td>
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<td>An express version of this session will be repeated on Day 2.</td>
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<th>EXTREME MAKEOVER: PHONATHON EDITION</th>
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<td>Joe Volturo, Lehigh University</td>
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<td>This presentation is recommended for those new to the world of phonathon. In a relaxed environment, Joe will explain how he took Lehigh’s declining phonathon to new heights and took control of his students and the program.</td>
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<td>Natosha will outline the interview overhaul Bucknell performed, explain why they decided to take a new approach and how they now execute their interviews to ensure they are hiring the right students for the job.</td>
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<td>Ellice Moore, Bucknell University</td>
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<td>In this open-dialogue session, Ellice will talk about Bucknell’s handbook, attendance policies, signups, and bonus structure – and how she keeps track of 80 student employees! This is a great time to hear what other programs are doing and how to make yours more efficient.</td>
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<td>Emily Myers, Mount Saint Mary’s University</td>
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<td>In this dialogue-based presentation specifically formulated for manual programs, Emily will talk about how her phonathon program organizes their manual calling sessions. From printouts to computer-organized calling, this session will allow you to explore new options to better execute your program’s needs.</td>
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<td>Amanda Walck, Albright College</td>
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<td>In this presentation, Amanda will talk about how Albright approached their first Challenge Day and how they incorporated their phonathon students. You’ll learn what worked for them, what did not, and how they will be approaching their next Challenge Day!</td>
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### NEW CALLER TRAINING

Natosha Kreamer, Bucknell University

Step into a Bucknell student caller’s shoes. In this presentation, Natosha will walk you through training as if you were a brand new caller. You’ll experience *almost* everything through a caller’s eyes. Shoes, unfortunately, not optional.

### SEGMENTATION TECHNIQUES

Angie Myers, Bucknell University

This presentation is recommended for programs with the ability to manipulate their data and build their own calling lists. Angie will demonstrate how Bucknell University decides who they are calling each night based on small differences such as a Lybunt213 and Lybunt57. Join Angie for a deeper dive into data!

### PAPER TO AUTOMATION: HOW TO TAKE THE PLUNGE

Chris Short, Wilson-Bennett Technology

This presentation is recommended for those looking to make the switch from a manual to automated program. Chris will talk about where to start and how to approach the decision. He will answer questions for programs looking for a change as well as answer questions from current WBT clients.

### A WORD FROM OUR SPONSOR: RNL TRAINING & PRODUCT Q&A

Sarah Patterson, Ruffalo Noel Levitz

Are you looking for a new calling software or are you already using RNL’s CAMPUSCALL? Sarah will answer questions for current clients, as well as answer questions about their product for programs looking to make a change.

### KEEPING CALLERS CONTAINED

Ellice Moore, Bucknell University

In this open-dialogue session, Ellice will talk about Bucknell’s handbook, attendance policies, signups, and bonus structure – and how she keeps track of 80 student employees! This is a great time to hear what other programs are doing and how to make yours more efficient. *This is a repeated session from Day 1.*

### QUALITY CONTROL

Natosha Kreamer, Bucknell University

This presentation is recommended for advanced programs. Natosha will walk you through what quality control means, how you can monitor your callers’ performance, and how to consistently improve your callers’ skills throughout the year.

### GOING SCRIPTLESS – BYO SCRIPT!

Angie Myers, Bucknell University

In this interactive workshop, Angie will outline how she took Bucknell’s Student Calling Program from a script-dependent program to a scriptless program. By bringing your own script, Angie will walk you through how to transition your program away from scripts for good! *This is a repeated session from Day 1.*

### DATA ANALYSIS

Clinton Crow, Crow Fundraising Concepts

This presentation is recommended for those newer to the world of phonathon. In this presentation, Clinton will outline how to understand your phonathon data, how different segments should perform, and how to apply your data findings to your calling sessions.

### THE FUTURE OF PHONE & YOUR CALLERS’ FUTURES

Rory Channer, Ruffalo Noel Levitz

For our last session, Rory will present his research on trends present in phone programs across the country and how students should think about their future careers as they participate in your program.