



# **FUNDRAISING VOLUNTEER BREAK-OUT**

**Alumnae Volunteer Summit**

**September 11, 2010**

# WHOOO'S WHO IN THE ANNUAL GIVING OFFICE

- Mary DiMarino

Director of Annual Giving Programs

Reunion Classes: 25<sup>th</sup>, 35<sup>th</sup>, 40<sup>th</sup>,  
50<sup>th</sup>, 55<sup>th</sup>, 60<sup>th</sup>

Non Reunion Classes: 1939-1985

- Louisa Wilson

Associate Director of Annual Giving

Special Constituent Programs

Reunion Classes 30<sup>th</sup> and 45<sup>th</sup>

- Lauren Craley

Associate Director of Annual Giving

Young Alumnae & Student Programs

Reunion classes: 5<sup>th</sup>, 10<sup>th</sup>, 15<sup>th</sup>, 20<sup>th</sup>

Non Reunion Classes: 1987 - 2010

- Lisa Shafer

Director of The Slade Society

- Alyssa Delafield

Annual Fund Associate

- Jessica Bass Kirk '91

Annual Fund Chair



# THE 2011 ANNUAL FUND

- \$4.85 million
- 40% Undergraduate Alumnae Giving Participation
- New and Increased Support



# HOW WE GET THERE

Program	FY09	FY10	FY11 Goal	% AF Goal
General Annual Fund	\$4,277,421	\$4,515,533		
<i>UG Alumnae</i>	<i>\$4,208,650</i>	<i>\$4,426,574</i>	<i>\$4,268,000</i>	88%
Parents Fund	\$ 393,324	\$ 312,501	\$ 343,751	7%
Arts & Sciences	\$ 140,260	\$ 135,552	\$ 142,330	3%
Social Work	\$ 110,906	\$ 98,339	\$ 103,256	2%
<b>Total</b>	<b>\$4,921,911</b>	<b>\$5,061,925</b>	<b>\$4,857,837</b>	<b>100%</b>



# WHO WE'RE COUNTING ON

UG Alumnae Giving	FY06	FY07	FY08	FY09	FY10	5 Yr. Avg.
Number of Donors	5,283	5,053	5,028	5,172	5,115	5,130

UG Alumnae Giving	Number of Donors	Projected Increase	Percent Participation
FY11 Goals	5,300	185	40%



# 125<sup>TH</sup> ANNIVERSARY SCHOLARSHIP INITIATIVE

- All new and increased gifts to the Annual Fund in 2010-11 will support our 125<sup>th</sup> anniversary scholarship initiative, which is seeking \$1.25 million in funding for scholarships.
- Here's how it works:
  - ***Increase your gift this year*** and we'll count it toward scholarships.
  - ***Make a first-time gift to the Annual Fund*** and we'll use it for scholarships.



# REACHING OUR GOALS

- A new participation model
- New Ask Amounts
- College and Volunteer Outreach
- Reunion Giving



# THE IMPORTANCE OF REUNION GIVING

- Goals: To raise \$953,500 (19%) of the overall Annual Fund Goal from 41% of Reunion Alumni

'01 & '06 Classes	FY09	FY10	FY11 Goal	% of Annual Fund
Participation	985 (35%)	918 (32%)	1046 (41%)	128
Dollars	\$ 651,894	\$ 728,962	\$ 953,500	19%



# STRATEGIES AND SPECIAL INITIATIVES

- Challenges, Regional Events, Class Competitions & Class Giving Awards
- Recruit an active committee with broad representation
  - Various Giving Levels
  - Geographic Regions
  - Dorm or Major
- Setting Class \$\$ and % goals
- New and Increased Gifts





# APPEAL STRATEGY

- Calendar Review
- The Impact of Volunteer Fundraising
- FY10 Volunteer Appeal Results
  - 79% of donations received from Direct Mail solicitations were the result of volunteer appeals



## ADDITIONAL WAYS YOU CAN HELP

- Recruit Additional Classmates to help
- Personal Outreach to classmates (Fall and spring semester calls)
- Host a gathering to build excitement
- Invite a less engaged classmate to a Bryn Mawr event.
- Thank Your Classmates



# TOOLS TO HELP YOU

- Reports and Information
- The Fundraising Volunteer Guide
- Volunteer Contact Report
- Annual Giving Office Staff (who to contact for what?)





# TALKING POINTS

# 125<sup>TH</sup> ANNIVERSARY SCHOLARSHIP INITIATIVE

- This year Bryn Mawr is hoping to raise in excess of \$1.25 million in funding for scholarships.
- All new and increased gifts to the Annual Fund in 2010-11 will support our 125<sup>th</sup> anniversary scholarship initiative.





## THE CASE FOR GIVING

- 62 % of undergraduates receive financial aid from the College.
- The College is committed to meeting 100 % of each student's financial need.
- Tuition and fees cover just over half of the cost of a Bryn Mawr education. Gifts to the Annual Fund help make up the difference.



# THE CASE FOR PARTICIPATION

- Improves the College's ability to leverage major gifts from other alumnae
- Improves the College's ability to secure grants from foundations and corporations
- Demonstrates:
  - Success of Bryn Mawr alumnae
  - Satisfaction with the quality of a Bryn Mawr education
  - Alumnae pride
  - Investment in the future of Bryn Mawr and its students



# MAKING THE ASK

- Before the Call
- During the Call
- After the Call





## COMMON OBSTACLES

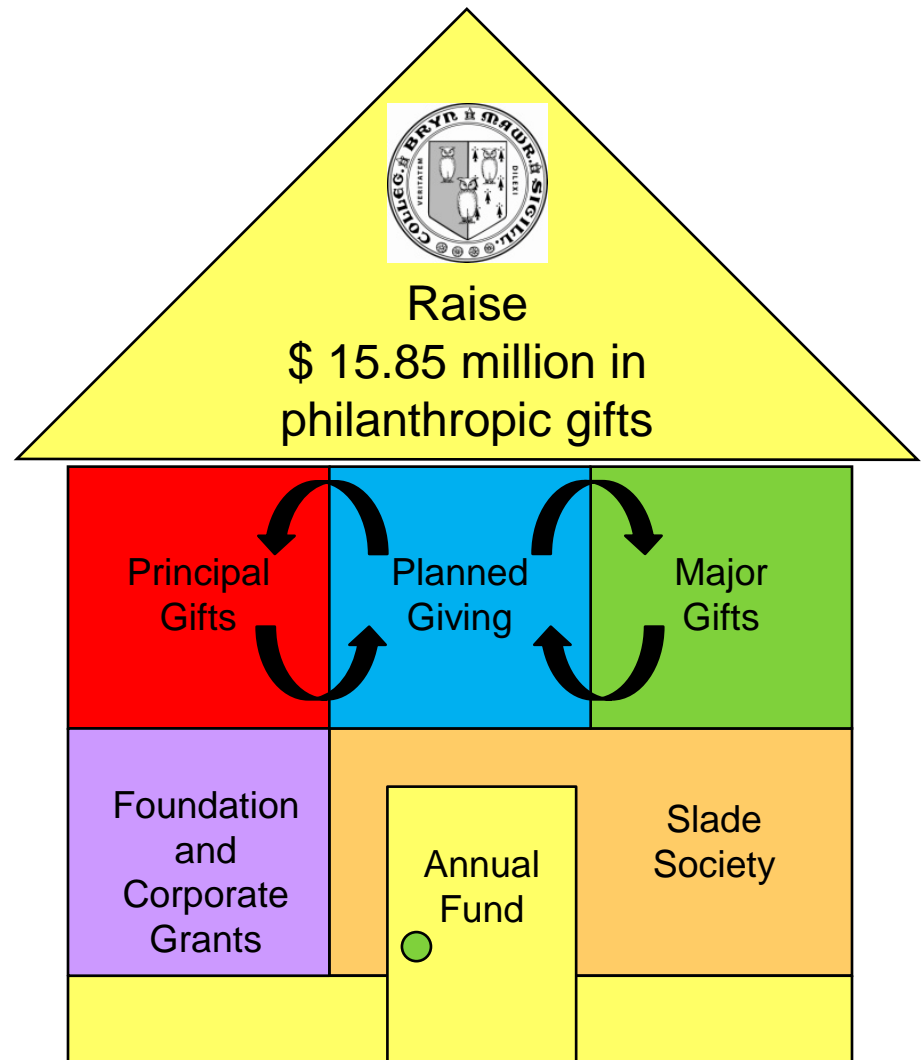
- When a classmate claims, “I’m financially strapped; I can’t give,” how should I respond?
- How should I respond to a refusal for non-financial reasons?



# Bryn Mawr College

## House of Philanthropy

- \$ 4.85 million Annual Fund
- \$ 8.00 million Endowment
- \$ 1.75 million Designated
- \$ 1.25 million Scholarships



# Gift Planning

What is it?

A gift vehicle that allows you to donate via a trust, annuity, insurance policy, or, most commonly, a bequest.

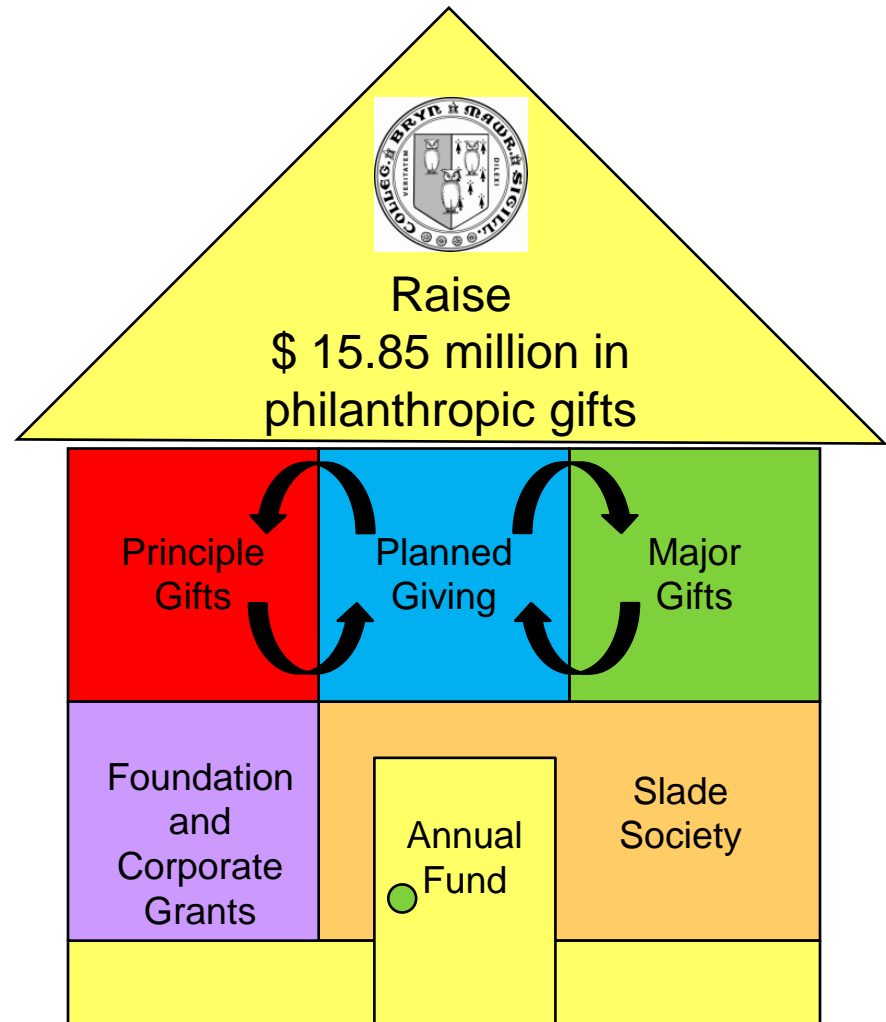
What is its practical equivalent?

A retirement account – money to secure the future for the donor and the College.

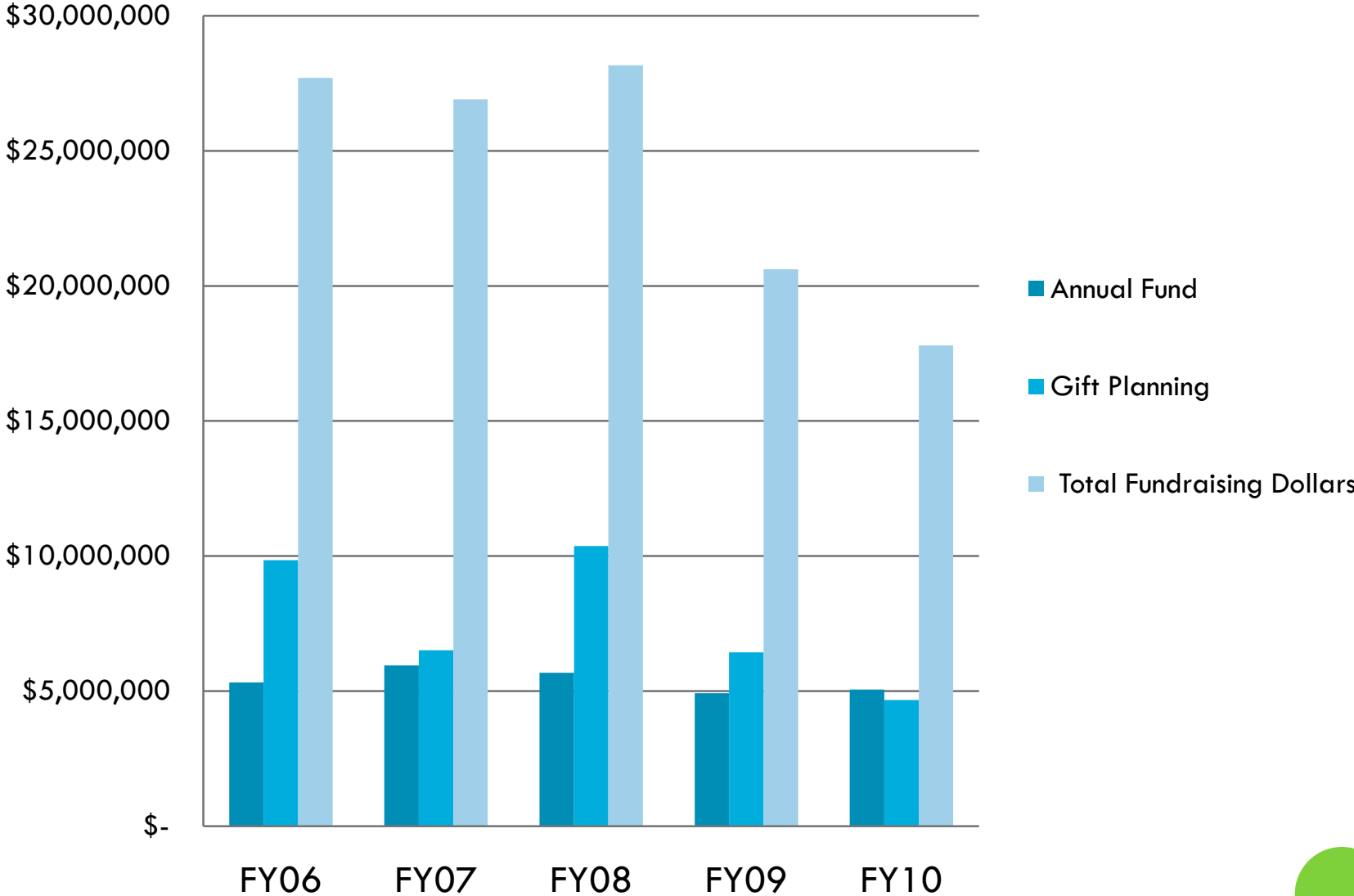
Who are the ideal planned gift donors?

Those in their 60s, 70s, or 80s who believe in giving back for the benefit of future generations.

Planned Giving is a facilitating tool to build the largest package of support from each donor.



# Five Year Snapshot



# HOW OLD ARE YOU AND DID YOU KNOW YOU COULD...?

## ○ Age and Wealth-Based Matrix

	-50 Younger	50-70 Middle-Aged	70+ Older
<b>Wealthy</b>	Gifts of Cash & Securities Charitable Lead Trusts Term of Years Trusts Life Income Gifts for Others Retirement Plans & Insurance Bequests	Gifts of Cash & Securities Charitable Lead Trusts Term of Years Trusts Life Income Gifts for Others Deferred Gift Annuities Retirement Plans & Insurance Bequests	Gifts of Cash & Securities Charitable Lead Trusts Term of Years Trusts Life Income Gifts for Others Charitable Trusts for Life Gift Annuities Retirement Plans & Insurance Bequests
<b>Moderate Means</b>	Gifts of Cash Retirement Plans & Insurance Bequests	Gifts of Cash & Securities Term of Years Trusts Charitable Trusts for Life Deferred Gift Annuities Retirement Plans & Insurance Bequests	Gifts of Cash & Securities Term of Years Trusts Charitable Trusts for Life Gift Annuities Retirement Plans & Insurance Bequests
<b>Limited Means</b>	Gifts of Cash Retirement Plans & Insurance Bequests	Gifts of Cash & Securities Deferred Gift Annuities Retirement Plans & Insurance Bequests	Gifts of Cash & Securities Gift Annuities Retirement Plans & Insurance Bequests





# The Taylor Society

*Honoring alumnae/i and friends who  
have created gift annuities, bequests  
and other planned gifts for Bryn Mawr.*



**BRYN MAWR COLLEGE**  
Bold vision. For women. For the world.

