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ESPECIALLY  
FOR FUNDRAISING  
VOLUNTEERS

MAKING THE CASE FOR  
ANNUAL GIVING

WELLESLEY COLLEGE



Wellesley's dedicated fundraising volunteers helped The Wellesley Campaign surpass the \$400 million goal, raising \$472.3 million from 2000 to 2005.

As we turn our attention to 2005-2006, we need to keep the momentum strong to strengthen support of Annual Giving.

THE MOST VALUABLE GIFTS  
ARE UNRESTRICTED



## THE CASE FOR ANNUAL GIVING

The most valuable gifts to Wellesley are unrestricted gifts.

Every year, Wellesley faces a budget balancing act, as do all colleges. While the College is committed to holding down the rate of tuition increases, it also pledges to maintain the highest standards of educational excellence.

Tuition and endowment income are the College's main sources of operating revenue, and yet cover only part of the expense it takes to operate Wellesley College. Annual gifts provide critically needed support to help bridge the gap.

Unrestricted contributions to Annual Giving are immediately expendable resources that help meet the College's current operational expenses. These gifts go to work immediately to support and/or enhance core programs, pay for scholarships, faculty salaries, new books, and/or upkeep of the campus.

This is why your efforts in seeking unrestricted gifts are so important.

### The Case for Participation

The number of Wellesley's alumnae who make gifts each year determines our participation rate. We focus on participation because:

- There is strength in numbers – many gifts add up to a large sum each year.
- A high participation rate signals alumnae satisfaction with the institution and continued support of its mission.
- Foundations and corporations from whom we seek grants see annual alumnae giving as an indicator of a healthy institution worthy of additional support.
- College ranking reports in magazines and other media examine alumnae participation rates when compiling their lists.

***Every gift – no matter the size – makes a difference!***

### Reunion Giving

Reunion is a time for many alumnae to reflect upon their Wellesley experience and the ways in which being a “Wellesley woman” has made a difference in their lives. Many alumnae find that making a special Reunion gift is a way to celebrate both Wellesley and their Reunion. We encourage alumnae to stretch their giving in their Reunion year – especially the milestone 10th, 25th, 40th, and 50th reunions.

## MAKING THE CALL

### **Four Steps to Successful Solicitation Conversations**

#### **Preparation – Before a Call:**

Think about what motivates you to support Wellesley with your gifts and your time. Remind yourself of your favorite Wellesley memories or the reasons why you chose to attend Wellesley. Be prepared to say why you are committed to the Reunion Class Gift effort and why you make your gifts every year.

Make your own gift or pledge before you start calling. Asking a classmate for her support is much easier to do when you have made your own commitment first. “Join me” is powerful language.

Read the information in your packet; familiarize yourself with the giving history of your classmate and/or fellow alumna; know the ask amount.

Discuss ways to “make the ask” with your Annual Giving staff liaison and/or your fellow committee members.

#### **Conversation – During Your Call:**

**Connect.** If your prospect is someone you know, tell her you are volunteering for the special gifts or participation efforts for your Reunion and that you want to talk to her about her gift this year. You could mention the most recent appeal:

*“I know you received a letter from Katie. I’m calling tonight to talk with you about Wellesley and discuss the opportunity for you to make a Reunion gift that counts toward our class. Is now a good time?”*

If your prospect is someone whom you don’t know well, introduce yourself as a Wellesley alumna calling on behalf of the College and your Reunion. Thank her for any past support. Encourage her to attend Reunion.

*“Susie, this is Linda Jones, your classmate from Wellesley. I am calling on behalf of our Special Gifts Committee to talk with you about our class’s Reunion gift. Is now a good time for you?”*

If the time is not good, make an appointment for a time when she will be available (whether at home or at work) and can focus on a quality conversation.

*“Would next Wednesday evening be good for you? I can call you after 8 p.m. when your children are asleep/after you’ve finished dinner/after you’ve returned from the gym...”*

**Ask for a specific amount.** We know that higher gifts are secured when a specific amount is suggested. Ask for the amount indicated on the call sheet. For example:

*“In honor of our Reunion this year, I hope you will consider making a gift of \$XX to support Wellesley,”*

or:

*“I hope you will join me in making an increased Reunion gift this year of \$XX in honor of our upcoming XXth Reunion.”*

**Wait for her response.** Once you have directly requested their support, sit back and wait. Let her think about your request and let her be the next person to speak.

*Stay positive:* Don’t be apologetic when introducing the ask amount – this minimizes the importance of the gift. She might be very willing to give the amount you suggest or she might need some time to think about her decision. If she says:

*“I’d like to think about it,”*

respond with:

*“That’s fine! I’m glad that you will give it serious consideration. May I answer any questions for you or address any concerns?”*

**Acknowledge and deal with objections:** An alumna expressing concerns is often saying “Tell me more...I’m not convinced yet,” not saying “no.” If the topic is something you are equipped to explain, talk about it. If it is something you cannot address, ask her if you could be in touch with Wellesley and find the answers for her. The next step is to call your Annual Giving liaison to ask for assistance.

**Consider negotiating** the amount of her gift if she says that she cannot give the amount you suggested. A phrase that might help a donor think about how generous she can be during a Reunion is, “You have been a loyal \$500 donor for three years. What would be an acceptable stretch gift for you during this Reunion campaign?”

In any case, do what you can to **help the alumna understand that her support is crucial to Wellesley.** Regardless of the size of the gift, the alumna should feel good about giving to Wellesley.

**Completion:**

Take the necessary steps to accommodate a prospect's consideration of your request. If she says:

Yes – thank her and share the various ways available to make her gift.

Maybe – inform her of the ways to make a gift and stress the importance of participation.

No – ask if she might consider a smaller, participation-level gift to be a part of the overall effort.

I already sent in my gift – thank her for her support.

*Verify her contact information, including her e-mail address(es) from the information printed on the call sheet.*

*Ask if she or her spouse/partner works for a matching gift company. Suggest she contact their human resources office to learn how to obtain a matching gift for Wellesley.*

*Explain follow-up. If your classmate makes a pledge, explain that she will receive a pledge reminder and gift envelope from the College. All gifts must be paid by June 30, the end of our fiscal year.*

*Communicate the call results to your staff liaison in the AG office. You can call, mail, fax, or e-mail the results in to your AG staff member. If a specific pledge has been made, timeliness is especially important so that we may pull her name from the next mailing and not send extraneous appeals.*

**Write a thank-you note.** Thanking classmates is one of your most important responsibilities. Your note of appreciation could be the first step in encouraging her future support of the College. Even if your classmate chooses not to make a gift, thanking her for her time and her thoughtful consideration of giving will end the experience on a positive note for both of you.

**Note:** Our work focuses on unrestricted giving. Donors to any of the Friends groups (Art, Athletics, Horticulture, and/or the Library), any Religious Life program and/or the Centers for Women do not require an additional note from you.

## HOW TO MAKE A GIFT

### Gifts by Check

Checks should be made payable to Wellesley College and mailed to the following address:

**Wellesley College  
106 Central Street  
Wellesley, MA 02481  
Attention: Development Services**

### Credit Card Gifts

The relative ease of making a credit card gift has made this a popular method of giving, particularly among the younger classes.

Donors can send credit card information (name as it appears on the card, cc#, date of expiration, gift amount) to the College address, or give the information to a volunteer who will pass it on to the Annual Giving Office. MasterCard, VISA, and American Express are accepted.

Donors can call the Annual Giving Office toll-free at 800-358-3543, and give their credit card information over the phone.

Donors can use the secure online giving Web site [www.wellesley.edu/Resources](http://www.wellesley.edu/Resources) and follow the “How to Make a Gift” link to access the gift form.

### Gifts of Securities (stocks, bonds, mutual funds)

Donating appreciated securities that you have owned for more than a year could entitle you to an income tax deduction for the full, fair-market value of your gift and avoidance of federal capital gains tax on the transfer. For more information on outright gifts of securities, contact Wellesley’s Securities Administrator at 781-283-2652.

### Corporate Matching Gifts

Gifts from corporations with matching gift programs are a vital addition to annual support. These gifts are generated by an employee, retired employee,

spouse, or partner. Usually the donor must obtain a matching gift form from the company's personnel or employee benefits office and forward it to Wellesley along with the gift. We credit matching gifts to the donor's class and region, and count them toward Durant Society membership.

Urge donors to investigate their companies matching gift policies and to follow through early in the fiscal year.

For additional information on making outright gifts using any of the above options, visit our Web site at [www.wellesley.edu/Resources](http://www.wellesley.edu/Resources) or contact the Manager of Gifts and Records at (781) 283-3791.

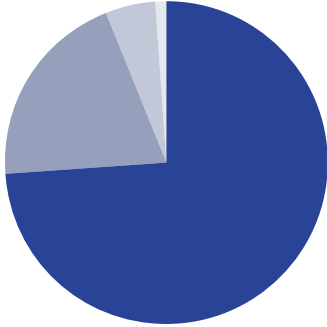
### **Life Income Gifts**

Also known as "Planned" or "Deferred Gifts", these provide lifetime income to the donor or another beneficiary, upon whose death Wellesley can use the gift principal. Life income gift donors receive donor and class credit for the IRS remainder value of the gift at the time it is made. For more information on life income gifts, contact the Planned Giving Office at 800-253-8916.

## HOW WELLESLEY ALLOCATES ITS RESOURCES

July 1, 2004 - June 30, 2005

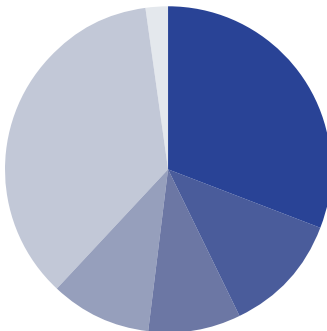
### Gifts By Source



- Alumnae: 74%
- Foundations: 5%
- Parents, Friends, and Clubs: 20%
- Corporate Grants and Matching Gifts: 1%

Alumnae	Gifts	\$29,809,929
	Bequests	35,854,679
Parents		741,282
Other Individuals & Clubs		17,230,599
Corporate	Grants	191,721
	Matching Gifts	641,090
Foundations		4,148,386
<b>Total</b>		<b>\$88,617,686</b>
Number of Alumnae Donors		15,450
Alumnae Participation Percentage		51.0%
Durant Society Membership		2,983

### Gifts By Purpose



- Educational and general endowment: 31%
- Other restricted spendable: 10%
- Unrestricted and current-use financial aid: 12%
- Facilities: 36%
- Financial aid endowment: 9%
- Planned gifts: 2%

Current – Use Support	Unrestricted	\$8,023,893
	Financial Aid	3,104,161
Facilities	Faculty Support, Academic Programs & General	5,799,411
	Friends Groups & Grants*	3,079,717
Endowment	Facilities	31,667,023
Total	Faculty Support, Academic Programs & General	
	Programs & General	27,446,095
	Financial Aid	7,871,516
	Planned Gifts	1,625,870
<b>Total</b>		<b>\$88,617,686</b>

\* Includes grants and gifts to the Center for Research on Women, the Stone Center, and the Wellesley Centers for Women

### The Durant Society of Wellesley College

The Durant Society honors alumnae, parents, and friends who have been especially generous to Wellesley. Membership qualifications are based on the total of an individual's personal gifts and anticipated corporate matching gifts within a single fiscal year.

All gifts, restricted or not, qualify a donor for the Durant Society. Planned gifts are recognized at the remainder value.

#### Benefits of Membership:

Durant Society members at all levels receive special mailings from the College to keep them informed about Wellesley.

They are listed, with their permission, in an annual listing of donors.

Members are recognized at the President's annual Durant Society reception during Reunion weekend.

Members of the Dean's and President's Circles are invited to a special dinner on campus at the Ruhlman Conference each May.

President's Circle members are invited to an annual recognition dinner and receive a letter from the College President about the year's notable moments and achievements.

#### Annual Membership Levels:

President's Circle	
President's Partner .....	\$50,000
Benefactor .....	\$25,000
Sponsor .....	\$10,000
Dean's Circle .....	\$5,000
Member .....	\$2,500
Young Alumna, 6th year out through 10th Reunion .....	\$1,000
Young Alumna, 1st year out through 5th Reunion .....	\$500

### The Tower Society

The Tower Society recognizes those who support Wellesley through planned gifts, including life income gifts, bequests, life insurance gifts, and gifts of retirement plan assets.

## THE ANNUAL GIVING SCHOLARS PROGRAM

Annual Giving Scholars is a current-use financial aid program connecting donors with students who need aid to fund their education. With a gift of \$10,000 or more to Annual Giving, a donor can create a one-year scholarship for an individual student. A donor who establishes an Annual Giving Scholarship receives written reports about her student, and the student learns the name of the donor as well as any other information the donor wishes to share. Each year, donors are invited to campus to meet their scholars at a special reception that celebrates the special relationship between the students and their supporters.

For more information about this special program, please contact the Annual Giving Office at 781-283-2440.



## FUNDRAISING TIPS AND TECHNIQUES

Few people will give without being asked.

Success comes from preparation, enthusiasm, patience, persistence, and a positive attitude.

Asking for a gift is easier than it seems. Relax. A phone call is an opportunity to share common interests in Wellesley with another alumna. You are giving her an opportunity to participate in a high-grade investment, an opportunity you can be proud to present to her.

You are asking for money for Wellesley, not for yourself. You are inviting a fellow alumna to join you in supporting something you know is worthwhile.

Increased involvement leads to increased giving. Feel free to recruit volunteers when you need assistance. Encourage friends to attend Wellesley events. Greater involvement with Wellesley often leads to increased financial commitment and overall satisfaction.

Recent-Frequent-Generous. The best donors are those who have given recently, consistently, and generously. Continue to cultivate them; they are the easiest to upgrade. They also can be your best assistants for soliciting other donors.

Aim high. If an ask amount is not suggested by your Annual Giving staff liaison, look at the donor's giving history and ask for an amount that is high enough to challenge your prospect. Most people know how much they can afford to commit and are flattered by the request to "stretch."

Touch their hearts. Gifts are based both on reason and emotion. The gift amount might come from the mind, but the actual giving comes from the heart. Focusing on genuine matters that touch an alumna's heart might motivate her to give.

"Thank you" is a powerful phrase. Regardless of the outcome of the solicitation, thank the alumna for her time in talking with you. That pleasant experience may be the deciding factor in a future gift.

## FUNDRAISING TERMS AND DEFINITIONS

<b>Annual Giving Committee</b>	Committee of 20-25 alumnae that reviews the plans of the Annual Giving program and provides contact between the College and major Annual Giving supporters and volunteers.
<b>Class Gift</b>	A gift to the College from a class treasury.
<b>Current Donor</b>	An alumna, parent, or friend, who makes a gift to the College – whether outright, planned, restricted, or unrestricted – during the current fiscal year (July 1 - June 30). Gift credit and alumnae participation are also extended for gifts to any of the Friends groups and/or the Wellesley Centers For Women.
<b>Current-Use Gifts</b>	Gifts used to support current fiscal-year budget needs.
<b>Deferred Gift</b>	A gift of cash, securities, or other assets which is not an outright gift. It may be a bequest, a life-income gift, life insurance, or interest in real estate. Also called a <i>life income gift</i> .
<b>Durant Society</b>	Wellesley's donor recognition society honoring alumnae, parents, and friends who have been especially generous to the College with their gifts of \$2,500 or more.
<b>Endowment</b>	Funds donated to Wellesley and invested by the College in order to generate income used to support current operations. Such funds are often designated for a specific purpose (such as financial aid or faculty salaries). The College spends only a portion of the interest earned by the Endowment.
<b>Endowed Fund/ Named Fund</b>	A permanent fund within the College's endowment that is named for an individual or group. Such funds are established through gifts of at least \$100,000.
<b>Fiscal Year</b>	July 1 – June 30. Named for the year in which June 30th falls.
<b>Gift Crediting Policy</b>	See <i>Reunion Gift</i> .
<b>Gifts in Kind</b>	Gifts of tangible personal property that can be used by the College (such as books, silver, antiques, or artwork).  If the independently appraised value of the gift is \$2,500 or more, it entitles the donor to annual Durant Society membership and is also credited to the alumna's class as part of its five-year Reunion gift total. Also called <i>tangible gifts</i> .
<b>Leadership Gift Prospect</b>	An alumna, parent, or friend believed to be able to give \$100,000 or more.

<b>Life Income Gift</b>	Provides income to the donor or another named beneficiary, upon whose death Wellesley can use the gift principal. <i>Examples are:</i> charitable gift annuities, pooled income funds, and charitable remainder trusts. Life income gift donors receive donor and class credit for the IRS remainder value of the gift at the time it is made.
<b>Matching Gifts</b>	Gifts from corporations with matching gift programs, generated by an employee, retired employee, or his or her spouse.  Usually the donor must obtain a matching gift form from the company’s personnel or employee benefits office and forward it to Wellesley along with the gift. We credit matching gifts to the donor’s class and count them toward Durant Society membership.
<b>Milestone Reunion (10th, 25th, 40th, and 50th)</b>	The 10th, 25th, 40th, and 50th Reunions. Milestone Reunions involve greater numbers of class fundraising volunteers and more intensive solicitation efforts.  Each milestone class has the opportunity to support a special class project for its Reunion fundraising efforts. If the class chooses this option, the class and the College must agree upon the special project and its financial goals <b>within the first two years of the Reunion cycle</b> . Because of the crucial need each year for unrestricted dollars, all classes with a milestone project must also set a comparable financial goal for unrestricted gifts.
<b>National Development Outreach Council (NDOC)</b>	The organization that sets overall policies and strategies for the College’s fundraising programs. Council members include both trustees and nontrustee alumnae representing specific programs, regions, and outreach activities.
<b>LYBUNT</b>	An acronym designating an alumna who gave <b>Last Year But Unfortunately Not This year</b> .
<b>Participation Rate</b>	The number of alumnae donors divided by the number of alumnae who receive appeals from Wellesley.  A class’s official Reunion participation rate is the rate achieved during the fiscal year of their Reunion.
<b>Planned Gift</b>	A gift of cash, securities, or other assets that is not an outright gift. It could be a bequest, a life-income gift, life insurance, or interest in real estate. See also <i>life income gift</i> .
<b>President’s Circle</b>	A membership level of the Durant Society designed to recognize annual donors of \$10,000 or more.

<b>Restricted Gifts</b>	Gifts designated by the donor for a specific purpose (such as scholarships, capital projects, or endowment funds).
<b>Reunion Gift</b>	<p>The five-year sum of all gifts credited to the class since the fiscal year of its last Reunion (e.g., from July 1 following a Reunion through June 30 of the next Reunion cycle), including:</p> <ul style="list-style-type: none"> <li>• all unrestricted gifts to the College</li> <li>• restricted gifts to Wellesley</li> <li>• corporate matches generated by a personal gift to the College</li> <li>• the remainder value of gifts to establish life income funds</li> <li>• the independently appraised value of tangible gifts</li> </ul> <p>Funds not received directly by the College are not credited to a class's Reunion gift total. These include gifts to clubs, class or club dues, or contributions to the Students' Aid Society.</p> <p>Bequests are not counted as part of the Reunion gift total.</p>
<b>Special Gifts Prospect</b>	An alumna, parent, or friend believed to be able to give \$2,500 or more.
<b>SYBUNT</b>	An acronym designating an alumna who gave <b>Some Year But Unfortunately Not This year</b> .
<b>Tangible Gifts</b>	Gifts of personal property that can be used by the College (such as books, silver, antiques, or artwork). Such a donation can offer substantial tax advantages to the donor. If the independently appraised value of the gift is \$2,500 or more, it entitles the donor to annual Durant Society membership and is also credited to the alumna's class as part of its five-year Reunion gift total. Also called <i>gift in kind</i> .
<b>Tower Society</b>	The Tower Society recognizes those who support Wellesley through planned gifts, including life income gifts, bequests, life insurance gifts, and gifts of retirement plan assets.
<b>Unrestricted Gifts</b>	Gifts not designated by the donor for a specific purpose, thereby allowing the College to decide the best use. The College uses unrestricted gifts to support the current year's highest priorities. These gifts are vital to Wellesley's financial strength and flexibility.

**FOR YOUR NOTES**

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WELLESLEY COLLEGE  
ANNUAL GIVING