Barnard Alumnae Fundraising Volunteer Guide

Mission Statement
Barnard College aims to provide the highest quality liberal arts education to promising and high-achieving young women, offering the unparalleled advantages of an outstanding residential college in partnership with a major research university. With a dedicated faculty of scholars distinguished in their respective fields, Barnard is a community of accessible teachers and engaged students who participate together in intellectual risk-taking and discovery. Barnard students develop the intellectual resources to take advantage of opportunities as new fields, new ideas, and new technologies emerge. They graduate prepared to lead lives that are professionally satisfying and successful, personally fulfilling, and enriched by love of learning.

As a college for women, Barnard embraces its responsibility to address issues of gender in all of their complexity and urgency, and to help students achieve the personal strength that will enable them to meet the challenges they will encounter throughout their lives. Located in the cosmopolitan urban environment of New York City, and committed to diversity in its student body, faculty and staff, Barnard prepares its graduates to flourish in different cultural surroundings in an increasingly inter-connected world.

The Barnard community thrives on high expectations. By setting rigorous academic standards and giving students the support they need to meet those standards, Barnard enables them to discover their own capabilities. Living and learning in this unique environment, Barnard students become agile, resilient, responsible, and creative, prepared to lead and serve their society.

-- Approved by the Trustees of Barnard College, June 2000
The Importance of Alumnae Fundraising Volunteers
Alumnae volunteer involvement is an important and crucial part of the College’s fundraising outreach. Volunteers are able to personalize the giving experience, increase the number of alumnae contacted, and provide the College with important insight regarding their classmates and other alumnae.

This volunteer experience provides alumnae with the opportunity to connect with classmates and gain an insider’s view of the College today. The annual giving staff is committed to making the volunteer experience as successful and positive as possible and will provide resources, like this guide, to assist you with your outreach.

The Role of Alumnae Fundraising Volunteers

Class Fund Chair: An appointed class officer who works directly with Barnard’s annual giving staff to help solicit unrestricted annual gifts from her class. During her five-year term she plans and implements a strategy for class initiatives in consultation with Barnard Development staff. She helps to set the pace by making her own gift to the Fund.

Annual Fund Volunteer: This network of volunteers makes personal contacts with donors and prospective donors throughout the year. These volunteers reach out to alumnae to ask for gifts to the College. Assignments are given out directly from the annual giving office on an individual basis.

Special Gifts Chair: The Special Gifts Chair works with the Class Fund Chair in designing and implementing a strategy for achieving ambitious reunion year goals. Additionally, she helps set the pace for the class's giving by making her own special commitment and reaches out to selected classmates for leadership gifts in honor of their reunion.

Reunion Fund Committee Members: Under the leadership of the Class Fund Chair, the Reunion Fund Committee members support the targeted efforts of the Chair by making their own leadership gift as well as soliciting classmates for gifts that are above and beyond their typical annual support.

Planned Giving Chairs: The Planned Giving Chair is a vital member of her class’s Reunion Fundraising Committee. She works closely with the College’s Planned Giving staff and her class’s Reunion Fundraising Committee to encourage classmates to consider making a planned gift in honor of their reunion.
The Importance of Alumnae Support
Support from Barnard alumnae is critical to the College’s continued success and positively impacts current students and faculty.

Areas of Support

Unrestricted Gifts
These are immediately expendable contributions that help Barnard meet its current operating expenses.

Gifts made to Barnard’s annual fund, are unrestricted contributions, and provide resources for scholarships, faculty support, campus renewal, and where Barnard needs it most.

Additionally, contributions made by Barnard parents to the College and a portion of Scholarship Dinner and Auction gifts are recognized as unrestricted support.

Reunion Giving
Reunion Giving provides alumnae with a special opportunity to celebrate their relationship with their alma mater and honor their experience as a student through their philanthropic support; in addition, it allows them the chance to be recognized as a class once again.

The Reunion Gift represents a class’s five-year cumulative total of all new gifts and pledges since the fiscal year after its last reunion (July 1st following the last reunion to the end of the fiscal year of the next reunion).

Planned Gifts
Planned Giving combines charitable contributions and financial planning, with benefits for the donor and for Barnard. All planned-giving donors qualify for membership in The Athena Society.

Examples of planned gifts include:

- **charitable gift annuities, charitable remainder trusts, and the pooled income fund** provide an income stream to the donor and/or other individual beneficiaries, with the remainder benefiting Barnard at the end of the gift term (which can be for life or a fixed number of years)
- **bequests** are gifts through a will or trust
- naming Barnard as a beneficiary of an IRA, 401(k), 403(b) or other retirement plan or as a beneficiary of a **life insurance policy** is another way to make a planned gift
Other Giving Opportunities
Restricted and endowed gifts, along with other designated gifts, provide important resources for the College. To learn more, please contact the Barnard Development Office at (212) 870-2520.

The 1889 Society
Membership in *The 1889 Society* is based on unrestricted gifts of $1,889 or more to Barnard’s annual fund that come in during a given fiscal year (July 1 – June 30). *The 1889 Society* acknowledges the founding of Barnard College in 1889.

Membership for Young Alumnae
Alumnae who have graduated in the last ten years and who make gifts of $100 multiplied by the number of years since graduation will also qualify for *The 1889 Society*.

Barnard College Scholars Program
By making a gift of $10,000 or more to Barnard’s annual fund, a donor can fund a one-year scholarship for an individual student. Barnard College Scholars Program makes every effort to connect students with the donors who support their education.

Athena Society
The Athena Society recognizes Barnard alumnae and friends who have remembered the College in their estate plans or other planned gifts. Donors who have made such meaningful arrangements support our talented students and faculty, and help to ensure Barnard’s tradition of excellence for generations to come.
The Impact Barnard Donors Have on Financial Aid
Alumnae support benefits many areas of the College including the level of financial aid Barnard awards each year. The charts below compare Barnard’s sources of financial aid awards with peer group institutions.

As with other colleges, Barnard’s endowment income is an important source of financial aid, but as illustrated in the graphs, Barnard’s current endowment is a fraction of the amounts of its peer institutions. The result of this is that the College relies heavily on unrestricted gifts, like those made to Barnard’s annual fund, to meet the needs of current students and maintain its need-blind admissions policy.
Tips for Successful Fundraising

• Make your own gift first!
• Be prepared: Review the call sheet so you know as much as you can before you call.
• Smile! It really does come through over the phone.
• Connect. Introduce yourself as a Barnard alumna and thank your fellow alumna for any past support. Recognition is powerful and helps create a relationship.
• Practice your pitch. The live call scripts will help you get started.
• Personalize the conversation: Share why giving is important to you or tell her something you find interesting about the College and the current students. Confirm contact information and ask about information that’s missing.
• Stay Positive! Don’t apologize when introducing the ask amount.
• Be comfortable with handling objections. Listen to what she is saying, but be willing to counter. (See Overcoming Objection, page 8)
• Remember that no matter what the outcome is, your call helps strengthen the relationship between the alumna and Barnard.
• Seal the deal: Confirm the gift - “Can we put you down for that?”
• Thank her!
• Report your results to a development officer.

Ways to Make a Gift and Gift Information

Online, Phone, or Mail
Barnard.edu/gift
(212) 870-2520
Barnard College, Box AS, 3009 Broadway, New York, NY 10027

Installment Giving
Installment gifts can be set up online or by credit card with a volunteer or development officer on a monthly, quarterly, or annual cycle.

Pledges
To be counted toward your class’ annual goal, gifts and pledge payments must be received by June 30th.

Matching Gifts
Corporate matches count toward gift society membership and are included in class fund totals. Companies with matching gift programs will supply employees with matching gift forms to fill out and send to the College along with their gifts or they will provide instructions for submitting requests electronically.
To see if a company has a matching gift program, go to barnard.edu/gift and search under “Corporate Matching Gift Programs.”

**Planned Gifts**
To support Barnard through a charitable gift annuity, charitable remainder trust, bequest, or other planned gift, please contact Audra Lewton at (212) 870-2534 or alewton@barnard.edu.

**Gifts of Stock, Other Securities and Wire Transfers**
Prior to initiating a stock gift or wire transfer, please call the Development Office at (212) 870-2520. Barnard College needs advance notice of transfers in order to ensure that the College is prepared to receive the transfer, identify the donor, and acknowledge the gift properly and in a timely manner.
OVERCOMING OBJECTIONS

The following statements are examples of comments made by alumnae during conversations with fundraising volunteers; the tips below each statement are meant as aids in addressing alumnae concerns.

I am not sure what I want to give.

- I’m glad to hear you are interested in supporting Barnard this year.
- Pledges help the College know how much support will be available for planning and budgeting purpose so that it can address the immediate needs of the students.
- It would be very helpful to put down an amount on the pledge card that you feel comfortable committing to. If you decide to increase the gift once you receive the pledge card in the mail, your additional support will make an even greater impact.
- Would you consider an amount of $XXX? Can we count on you for that?
- Thank you!

The amount I can give is so small it probably won’t help very much.

- Every contribution to the College is very important and collectively alumnae support makes a significant impact.
- Your pride in Barnard shows in your participation, and your giving keeps the College’s programs strong.
- Corporations and foundations consider alumnae participation in their grant-making decisions.
- U. S. News & World Report bases its rankings, in part, on alumnae participation in giving, so gifts of any size help.

I can’t afford to give right now. Positive reason (e.g. new house, retirement, graduate school, etc.)

- Congratulations!
- Remind her again that every gift is important because corporations and foundations look at the alumnae participation rate when considering grant proposals.
- Many of our classmates are in that situation as well and have adjusted their giving to a level that is comfortable for them.
- Participation is an important indicator of alumnae commitment to the College. Is there a level that would work better for you?

I can’t afford to give right now. Negative reason (e.g. job loss, death in the family, etc.)

- Empathize with her situation.
- For some people in this situation, planned gifts are a great way to give back. Is this something you’d be interested in learning more about? (Report results to a Development Officer for follow up.)
- If appropriate, let her know that Barnard’s Career Development Office offers support to alumnae; their number is 212.854.2033.
- If the deceased is a Barnard alumna or parent, ask if you may pass on the date of death to Alumnae Affairs at 212.854.2005.
I don’t like making commitments over the phone.
- I’m glad to hear you are interested in supporting Barnard this year.
- Pledges help the College know how much support will be available for planning and budgeting purposes so that it can address the immediate needs of the students.
- It would be very helpful to put down an amount on the pledge card that you feel comfortable committing to. If you decide to increase the gift once you receive the pledge card in the mail, your additional support will make an even greater impact.
- Would you consider an amount of $XXX? Can we count on you for that?
- Thank you!

I had a bad experience at Barnard.
- Listen to her complaint.
- I am sorry to hear that.
- Always keep your own Barnard experience positive during the conversation.
- Have you tried attending an alumnae event such as Financial Fluency or Reunion? You may be interested to see how much the College has changed in recent years.
- Relate any experience you have had with current students and mention Barnard Magazine and Barnard’s Web site to learn more about the College today.

I give my money to other charities.
- I’m glad to hear you support these other worthwhile causes.
- We certainly don’t want to take your support away from them. But can you also make Barnard a philanthropic priority this year?
- Your support helps maintain the high quality education that the College provides to today’s students.
- Barnard plays a crucial role in producing women who lead and work for charitable organizations that our alumnae also support.
- Can we count on your participation this year?

I give to Columbia. Doesn’t that count for my Barnard gift? Why do I need to give to Barnard too?
- Since Barnard is an independent institution and financially independent from Columbia, gifts made to Columbia (including bequests and athletics) do not benefit Barnard.
- In fact, Barnard pays an annual fee to be a part of Columbia’s community.
- The College’s relationship with Columbia remains strong, and the students continue to benefit from the resources of a large research institution with Division I sports while gaining a small liberal arts experience.
- Your support will help provide additional resources at Barnard.
- Can we count on your gift this year?

My daughter (niece, granddaughter) didn’t get in to Barnard.
- I can understand your disappointment with that decision. Admission to Barnard has always been very competitive, now more than ever. This year’s pool of applicants was so
exceptional that a number of deserving students such as your daughter (niece, granddaughter) were not accepted.

- I’m sure she will have a great experience at the institution she chose. Finding the perfect fit is key in selecting a college and I’m sure you want her to be in a place that’s a good fit for her.
- The fact that you felt so strongly about your daughter (niece, granddaughter) attending your alma mater shows how much you value the experience you had here.
- Would you consider a gift of $___, in honor of your time here?

The only mail I ever get is when the College asks for money.

- I’m sorry to hear that it feels that way.
- Are you receiving Barnard Magazine? Every alumna for whom we have a correct address is to receive the quarterly magazine.
- Much of our news and many event invitations are sent via email. Would you like to share your email address with us?
- Every contribution to the College is very important and collectively alumnae support makes a significant impact. Corporations and foundations consider alumnae participation in their grant-making decisions.
- Consistent giving helps the College know how much support will be available for planning and budgeting purposes so that it can address the immediate needs of the students.

I don’t support the College financially because…

- Listen to her reason.
- Find a way to respond positively to her story.
- Every contribution to the College is very important and collectively alumnae support makes a significant impact.
- Corporations and foundations consider alumnae participation in their grant-making decisions.

I give the College my time, but I give my money elsewhere.

- Thank you for your commitment to Barnard College. Volunteer service is so important.
- I’m glad to hear you support these other worthwhile causes.
- We certainly don’t want to take your support away from them; can you also make Barnard a philanthropic priority this year?
- Your support helps maintain the high quality education that the College provides to today’s students.
- Barnard plays a crucial role in producing women who lead and work for charitable organizations that our alumnae also support.

I’d like to support the college, but I’m not certain how to do so.

- I’m glad to hear you are interested in supporting Barnard this year.
- Pledges help the College know how much support will be available for planning and budgeting purpose so that it can address the immediate needs of the students.
• It would be very helpful to put down an amount on the pledge card that you feel comfortable committing to. If you decide to increase the gift once you receive the pledge card in the mail, your additional support will make an even greater impact.
• You can give online at http://barnard.edu/gift or you can call the Office of Development at 212.870.2520 to give over the phone. Gifts to the College can be in the form of check, credit card, gifts of securities, and other planned gifts.

I gave on Giving Day.
• Thank you! We are glad you were able to participate in the excitement of the day. This is a new initiative with Columbia. How did you find the experience?
• Giving Day is a special event which we are happy you included in your annual giving plan. We hope you are able to stay committed to your previous level of giving or increase it, if possible.

I only have boys; who can’t attend Barnard! My contributions will be going to their institutions.
• I understand the pressures of supporting a child’s school or college; we hope you will continue to give at a level that is appropriate, given your resources.
• Your pride in Barnard shows in your participation and your giving keeps the College’s programs strong.
• Corporations and foundations consider alumnae participation in their grant-making decisions.
• Your support helps maintain the high quality education that the College provides to today’s students.
• By giving to Barnard today, you help ensure Barnard’s future - educating smart independent young women of tomorrow.

Why is Barnard’s tuition so high?
• I’m glad you asked, a liberal arts education is expensive.
• We have to support faculty in an ever-widening set of academic disciplines and provide competitive benefits to our faculty and staff.
• Our facilities must be maintained/upgraded to support the College’s academic mission.
• We assure access for all qualified students through financial aid. Because of financial aid, almost half our students pay less than the full price.
• Our full tuition, room and board rates are comparable to those of our peers – Ivy League schools and liberal arts institutions.
Volunteer Resources
The Barnard Development Office is here to help! As a Barnard alumna fundraising volunteer, a development officer will work closely with you on individual classmate outreach and other fundraising activities. In addition to this staff contact, the following resources are also available to assist you.

Contact Information

Important Phone Numbers
Annual Giving Office: (212) 870-2578
Development Office: (212) 870-2520
Alumnae Affairs: (212) 854-2005
Career Development: (212) 845-2033

Important Email Addresses
Development Office: development@barnard.edu
Barnard College Annual Giving: annualgiving@barnard.edu
Planned Giving: plannedgiving@barnard.edu
Parent Giving: parents@barnard.edu
The Senior Fund: seniorfund@barnard.edu
Barnard Gala: gala@barnard.edu

Alumnae Affairs
Update Contact Information: alumrecords@barnard.edu or logon to the Alumnae Network Web site at alum.barnard.edu
Alumnae Class Notes: classnotes@barnard.edu
Alumnae Reunion: reunion@barnard.edu
Alumnae Events and Activities: alumnaeaffairs@barnard.edu
Alumnae Network Web Site Assistance: alumhelp@barnard.edu
Glossary

**The 1889 Society** – Barnard’s leadership giving society, which recognizes unrestricted cash or cash equivalent gifts of $1,889 or more to Barnard’s annual fund in a fiscal year to support current funding needs. Young Alumnae who have graduated in the last ten years and make gifts of $100 multiplied by the number of years since graduation will be recognized at The 1889 Society level.

**Acknowledgement Report** – A report provided to Class Fund Chairs by Barnard’s annual fund staff that lists all gifts to Barnard’s annual fund received during the most recent giving period. Class Fund Chairs are encouraged to use the confidential information provided in the report to thank their classmates for their support of Barnard’s annual fund. (Barnard stationary is available upon request.)

**The “Ask”** – The actual solicitation for financial support.

**The Ask Amount** – The amount set by the Development office, to use as the suggested ask for donors any given fiscal year.

**Athena Society** – The Athena Society recognizes Barnard alumnae and friends who have remembered the College in their estate plans or other planned gifts. Donors who have made such meaningful arrangements support our talented students and faculty, and help to ensure Barnard’s tradition of excellence for generations to come.

**The Annual Fund** – The annual fund is the College’s primary area of unrestricted support. Barnard’s annual fund directly supports the College’s yearly operating budget by providing resources for scholarships, faculty support, campus renewal, and wherever Barnard needs it most.

**The Annual Giving Committee (AGC)** – the Annual Giving Committee is responsible for assisting in the development of the alumnae annual giving program in consultation with the Director of Annual Giving and other appropriate College staff members.

**Capital Gifts** – Restricted gifts that are designated for the College’s endowment or for major “capital” projects such as buildings.

**Endowment** – Funds donated to Barnard and invested by the College to support long-term initiatives or projects such as scholarships, professorships, and programs. The College relies on endowment income, not the principal itself, for financial support. The usual gift to establish any endowed fund is a minimum of $100,000 – payable over five years.
**Fiscal Year** – The period between July 1st and June 30th is the timeframe Barnard uses for budgetary purposes, as well as the solicitation and recording of gifts to the College.

**LYBUNT (Last Year, But Unfortunately Not This year)** – Donors who made a gift to the College during the last fiscal year, but have not renewed their support for the current fiscal year.

**Matching Gifts** – Corporate matches that count toward gift society membership and are included in class fund totals. Companies with matching gift programs will supply employees with matching gift forms to fill out and send to the College along with their gifts or they will provide instructions for submitting requests electronically.

**Operating Budget** – The pool of money used annually to support the College’s expenditures. Dollars raised by Barnard’s annual fund are directed to the operating budget, in addition to revenues generated by tuition and the endowment.

**Participation Rate** – The number of alumnae donors divided by the number of alumnae who are solicitable in a fiscal year.

**Phonathon** – A yearly fundraising effort that takes place each winter. Phonathon brings alumnae volunteers together to reach out to other alumnae and ask them to make a gift to Barnard’s annual fund.

**Planned Gift** – Planned Giving combines charitable contributions and financial planning, with benefits for the donor and for Barnard. All planned-giving donors qualify for membership in The Athena Society.

**Restricted Gifts** – Also known as designated gifts, these are targeted for a specific purpose and are not counted in Barnard’s annual fund, but do count toward class income and participation totals.

**Reunion Gift** – All new gifts and pledges made to any area of the College since the fiscal year after the alumna’s last reunion year to the close of their current fiscal reunion year. The Reunion Gift is essentially a five-year cumulative total.

**SYBUNT (Some Years, But Unfortunately Not This year)** – A donor who made a gift at least once in the past five years, but not the last fiscal year or the current one.

**Unrestricted Gifts** – Gifts that support the current year’s highest priorities. These contributions are vital to Barnard’s financial strength and flexibility.