



IN SUPPORT OF BRANDEIS UNIVERSITY

# Brandeis National Committee Strengthening Fundraising in Chapters

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# Mission

Brandeis National Committee is dedicated to providing philanthropic support to Brandeis University, a distinguished liberal arts and research university founded by the American Jewish community. Its membership is connected to the university through fundraising and through activities that reflect the values on which the university was founded: academic excellence, social justice, nonsectarianism and service to the community.

# Strengthening Fundraising in Chapters

## Creating a Positive Environment:

- Education and awareness
- Positive feedback and encouragement
  - These are volunteers, not professionals
- Assume good intentions
- What are the motivators for success?



# Events – Designate Events

- Proceeds from an event must be clearly stated on all invitations, fliers and publications



- If the chapter events are not designated toward a particular fund, the proceeds will benefit the Brandeis libraries

- Fair Market Value – the value of the goods and services that are received by a donor attending a BNC event
- Determining FMV Example:
  - If you have a fundraising luncheon you determine the costs of the hotel, food, entertainment, parking, etc. and divide this by the number of guests expected



# Events – Quid

- IRS definition of Quid– payment that a donor makes to a charity which is partly as a contribution and partly for goods or services is a quid pro quo.
- Example: If a donor gives a charity \$100 and receives a theatre ticket valued at \$40, the donor has made a quid pro quo contribution.
  - Charitable contribution: \$60
  - Quid: \$40



# Year End Close Clarification

- Brandeis University Fiscal Year
  - July 1st – June 30th
- Direct Contributions:
  - Any and all contributions sent directly to the university by June 30<sup>th</sup> will count for the year
- Income from Chapter Events:
  - The University closes its books in June each year
  - Due to the processing in receiving chapter monies and expenses, chapter event income sent in for June will be counted in the following year's fundraising goals



# Checks from BNC Donors

- Ideally, the chapter should send checks directly to National for gifts of \$250 or more upon receipt.
  - Comply with IRS guidelines and Brandeis can provide tax receipts
  - Acknowledge the donor and maintain a record of the member's giving history



# Membership Checks

- Encourage members to renew or join BNC online
  - Expedites the process
  - Member will get an immediate acknowledgment of their donation
  - Decreases error rate
  - Allows members to join study groups and get member rate for events
- If members want to pay by check, they should be encouraged to send their payment to National

# Join / Renew Online

The screenshot shows a web browser window displaying the Brandeis National Committee website. The browser's address bar shows 'www.brandeis.edu/bnc/'. The website has a blue header with the Brandeis University logo and navigation links: ABOUT, ACADEMICS, ADMISSIONS/AID, ARTS, ATHLETICS, NEWS/MEDIA, RESEARCH, and STUDENT LIFE. Below the header is a search bar and a 'BRANDEIS.EDU THIS SITE' link. The main content area features a large image of a woman with glasses and a 'Take the Survey' button. To the left is a vertical menu with links: WHO WE ARE, GET INVOLVED, COMMUNITY AND SOCIAL JUSTICE, PHILANTHROPY, LEARNING, RESOURCES, NEWS AND EVENTS, and JOIN OUR E-MAIL LIST. Below the image is a 'HOME' link. The main text reads: 'We are the future of the Brandeis National Committee. Help shape the future of the BNC. Share your experiences; tell us why you joined, why you renew your membership and how can we make your membership even better.' Below this is a 'Take the Survey' button. Further down, it says: 'Since 1948, the Brandeis National Committee has been an integral part of Brandeis University, supporting its libraries, raising funds for neuroscience research and student scholarships - putting philanthropy first. We are the world's largest friends to a university organization with over 25,000 members. Join BNC and be a part of a vibrant community of active lifelong learners who also enjoy making a difference in their community. Enrich your life, make new friendships and be a part of Brandeis!' Below this text are buttons for 'CHAPTERS', 'DONATE', 'EVENTS', 'EDUCATION', 'JOIN', and 'RENEW'. On the right side, there is a 'JOIN OR RENEW TODAY' section with a 'Join/Renew Now' button and a list of benefits: 'Be a part of a vibrant community of active learners', 'Support Brandeis University', 'Make new friendships', 'Enroll in study-group programs created exclusively for BNC members', and 'Receive Brandeis Magazine and join UOW programs!'. At the bottom right, there are social media icons for Facebook, YouTube, and Twitter, and a 'Become A Member' button. The footer contains the address: 'Brandeis National Committee | Bernstein-Marcus, MS 132 | 415 South Street, Waltham, MA 02453 | (781) 736-7588 / (888) 862-8692 (p); 781-736-4118 (t)'.

# Checks from BNC Donors

- Recurring Problems:
  - Chapters deposit checks directly
    - Results in significant delays in receiving information about donations and delays in issuing a tax receipt for larger donations
    - BNC is not able to acknowledge the donor in timely manner
    - Increases error rate
  - Bundling checks
    - Some chapters collect checks for an event (or membership) months in advance and wait to send these in
    - Donors expect checks to be deposited and issued a receipt/acknowledgment
    - Membership checks that are not forwarded result in delays with members being able to sign up for study groups and counted as a member
  - Members take a collection and write a check from their personal account
    - Person writing the check gets a tax deduction
    - BNC donors do not get credit or acknowledged

# Recurring Gift Option

- Members can make a monthly contribution of any amount
  - If members want to become a Sustainer for the Sustaining the Mind campaign, they can donate \$200/month over 5 months.

[giving.brandeis.edu/BNCrecurring](https://giving.brandeis.edu/BNCrecurring)



Please Note: Must Type in the Gift Designation

- Ask chapters to promote recurring gifts option in their bulletins
- Members who make recurring gifts are 7X more likely to leave a bequest to the organization

## Events - Budgeting to Make a Profit

- To increase profits, chapters should create a budget for their events
  - Establish financial goals for events
  - Determine the price needed to cover expenses and make a profit
- Addresses the Question:
  - Will the profit be worth the effort?
- Best practice - 20% expenses and 80% profit



# Sustaining the Mind Countdown

- Our plan is to reach our goal and finish the campaign in FY15
  - BNC has always made their campaign goals!!
- We are 2/3 of the way there!!
- Important for every chapter and member to participate
- Communication Plan – want to include everyone



# Planned Giving

- Your gift can benefit thousands for generations to come
- A way of expressing your hopes and dreams for the future
  - Way of making a difference in the world
  - Way to ensure your values live on for future generations at Brandeis
- BNC Friends and Members are the Perfect Demographic

“The true meaning of life is to plant trees, under whose shade you do not expect to sit.”

Nelson Henderson

# Planned Giving

- Gifts Anyone Can Afford
  - Charitable gift annuities
  - Provides income for life
  - Lowers income tax
  - Gives you spendable income
- Bequests/ Will –
  - Gifts that cost nothing during your lifetime
  - Perfect for donors who worry they can't afford a cash gift

leave your  
**lasting  
legacy**



# Promoting Planned Giving

- Chapter Bulletin Ads
- Testimonials
- Education and Awareness
- BNC Handouts

HAVE FUN !!



**CELEBRATE**  
*Success!*

# Questions?

Please call M'Lissa Brennan  
or email [mlissa@brandeis.edu](mailto:mlissa@brandeis.edu)