The Wellesley Fund 101

Elizabeth Preis ’91, Wellesley Fund Chair

Kimberly Hokanson, AVP for Resources

Laura Christian, Director of The Wellesley Fund

Emily Randall ‘08, Major Gift Officer
FY14 Dollars Raised

$55.2 Million!

Restricted Gifts

Unrestricted and Current Use
a.k.a. The Wellesley Fund

Corporate, Foundations and Other

Life Income Gifts

Bequests

$24,633,892

$11,463,534

$3,503,833

$4,155,916

$11,444,577

Note: Does not reflect $40.9 million bequest from Kathryn Wasserman Davis ’28.
**FY14 Wellesley Fund Results**

<table>
<thead>
<tr>
<th>TWF Gift Level</th>
<th>Donors</th>
<th>% of Total</th>
<th>Total Cash</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500,000</td>
<td>1</td>
<td></td>
<td>$612,845</td>
<td></td>
</tr>
<tr>
<td>$250,000</td>
<td>1</td>
<td></td>
<td>$320,000</td>
<td></td>
</tr>
<tr>
<td>$100,000</td>
<td>12</td>
<td></td>
<td>$1,287,952</td>
<td></td>
</tr>
<tr>
<td>$50,000</td>
<td>16</td>
<td></td>
<td>$879,349</td>
<td></td>
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<tr>
<td>$25,000</td>
<td>27</td>
<td></td>
<td>$814,893</td>
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<tr>
<td>$10,000</td>
<td>143</td>
<td></td>
<td>$1,755,673</td>
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<tr>
<td>$5,000</td>
<td>229</td>
<td></td>
<td>$1,282,883</td>
<td></td>
</tr>
<tr>
<td>$2,500</td>
<td>654</td>
<td></td>
<td>$1,749,797</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>1,083</strong></td>
<td><strong>6.8%</strong></td>
<td><strong>$8,703,392</strong></td>
<td><strong>76.0%</strong></td>
</tr>
<tr>
<td>$1,000</td>
<td>843</td>
<td></td>
<td>$1,031,531</td>
<td></td>
</tr>
<tr>
<td>$500</td>
<td>1,010</td>
<td></td>
<td>$549,926</td>
<td></td>
</tr>
<tr>
<td>$250</td>
<td>1,274</td>
<td></td>
<td>$366,629</td>
<td></td>
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<tr>
<td><strong>Subtotal</strong></td>
<td><strong>3,127</strong></td>
<td><strong>19.6%</strong></td>
<td><strong>$1,948,086</strong></td>
<td><strong>17.0%</strong></td>
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<tr>
<td>$100</td>
<td>4,608</td>
<td></td>
<td>$578,049</td>
<td></td>
</tr>
<tr>
<td>&lt;$100</td>
<td>7,170</td>
<td></td>
<td>$215,050</td>
<td></td>
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<tr>
<td><strong>Subtotal</strong></td>
<td><strong>11,778</strong></td>
<td><strong>73.7%</strong></td>
<td><strong>$793,099</strong></td>
<td><strong>6.9%</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>15,988</strong></td>
<td></td>
<td><strong>$11,444,577</strong></td>
<td></td>
</tr>
</tbody>
</table>

15,988 alums, parents, faculty and friends gave to TWF, while 16,396 alums made a gift to Wellesley for a **53.4%** participation rate!
<table>
<thead>
<tr>
<th>FY15 Wellesley Fund Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dollars</strong></td>
</tr>
<tr>
<td>$10.5 million</td>
</tr>
<tr>
<td><strong>Durants</strong></td>
</tr>
<tr>
<td>$8 million</td>
</tr>
<tr>
<td>from 1,000+ Durant-level gifts</td>
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</tbody>
</table>
The Durant Society
Durant Society Levels

$50,000+  President’s Circle Partner
$25,000  President’s Circle Benefactor
$10,000  President’s Circle
$5,000  Dean’s Circle
$2,500  Durant Society Member

$1,000 for ’05-’09 graduates
$500 for ’10-’14 graduates
Durant Society Benefits

Members and Dean’s Circle Benefits
• Invitation to attend the Durant Reception with President Bottomly during Reunion
• Invitation to attend semi-annual conference calls to hear the latest campus news from Deans and other members of the College’s senior staff
• Regional event invitations

President’s Circle Benefits
• Include all the above, plus invitations to the Ruhlman & Tanner Conferences; participation in the annual State of the College conference call with President Bottomly for President’s Circle members; the opportunity to sponsor and form a relationship with a Wellesley Fund Scholar, and more…
FY14 Durant Society Results
FY14 Durant Society Results

**Overall** (*gifts for all purposes*)
- 1,482 gifts (a 6% increase from FY13!)
- $73 million

**Wellesley Fund** (*unrestricted, current-use financial aid*)
- 1,083 gifts (7% of all Wellesley Fund donors)
- $8.7 million (76% of the Wellesley Fund total)
Alumnae Participation and the Road to 55%
Alumnae participation is 5% of ranking criteria, and where The Wellesley Fund and our volunteers can have an impact!

2014 RANKINGS
College (FY13 Participation)
#1 Williams 60%
#2 Amherst 57.7%
#3 Swarthmore 53%
#4 Middlebury 55%
#4 Pomona 36%
#4 Bowdoin 59%
#7 **Wellesley 49.4%**
#7 Carleton 49%
#9 Davidson 60%
#9 Haverford 50%
#9 Claremont McKenna 43%

2015 RANKINGS
College (FY14 Participation)
#1 Williams 60%
#2 Amherst 54.6%
#3 Swarthmore
#4 **Wellesley 53.4%**
#5 Bowdoin 59.3%
#5 Pomona 29%
#7 Middlebury 55%
#8 Carleton 47%
#8 Claremont McKenna 40%
#8 Haverford
Participation History

Alumnae Participation Rate
FY 1985-2014

Campaign for $150M

The Wellesley Campaign
How Does Your Class Stack Up?

Class of 1959 55th Reunion
81%

Class of 2014 Senior Gift
82%
Gift Designations: “What Counts”

**THE WELLESLEY FUND**

- Essential Wellesley (Unrestricted: where it is most needed)
- Iconic Wellesley
- Greener Wellesley
- Academic Wellesley
- Parents Fund

**Financial Aid**

- Current-Use
- Wellesley Fund
- Scholars

**RESTRICTED**

- Academic Departments
- Student Activities
- Davis Museum
- Endowed professorships
- Wellesley Centers for Women
- Madeleine K. Albright Institute
- Friends: Library • Arts • Athletics
- Botanical Gardens (and much more)

**OTHER PAYMENTS**

Class Affiliations: *Annual Dues • Lifetime Memberships*

Club Affiliations: *Clubs Dues • Fees for Events*

**SEPARATE FROM COLLEGE**

- Students’ Aid Society
- TZE
- Shakespeare Society
- ZA
- Φ Σ

- Alumnae Affinity Groups (e.g. WAAD)
- Alumnae Association (e.g. Spirit Fund gifts)
Multi-Payment and Recurring Giving

- Increase the impact of your gift by giving less, more often.
- Make a Durant Society or stretch gift more feasible.
- Set up a gift for future years.

<table>
<thead>
<tr>
<th>Total Gift</th>
<th>12</th>
<th>9</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,500</td>
<td>$208</td>
<td>$250</td>
<td>$625</td>
</tr>
<tr>
<td>$1,000</td>
<td>$83</td>
<td>$100</td>
<td>$250</td>
</tr>
<tr>
<td>$500</td>
<td>$42</td>
<td>$50</td>
<td>$125</td>
</tr>
<tr>
<td>$250</td>
<td>$21</td>
<td>$25</td>
<td>$63</td>
</tr>
<tr>
<td>$120</td>
<td>$10</td>
<td>$12</td>
<td>$30</td>
</tr>
</tbody>
</table>

Multi-Payment Gift vs. Recurring Gift

“I want to make a gift of $200 over the next two years, making payments quarterly.”

“I want to make a gift of $25 every quarter until I tell Wellesley otherwise.”
50% for $500k Challenge

- 5,700+ new alumnae gifts made in the month of June.
- 992 website gifts made on June 30th alone – a record!
- “Leaderboard” tracked gifts by class color, decade, dorm, region and major.
- Social media presence: #50for500k, #wellesleylove
- Events in Boston and SF.