



Campaign Volunteer Leadership Handbook

Baruch
COLLEGE
The City University of New York

BARUCH MEANS BUSINESS • REACHING NEW HEIGHTS OF EXCELLENCE



Dear Volunteer,

Thank you for volunteering on behalf of *Baruch Means Business • Reaching New Heights of Excellence*, the campaign for Baruch College. This leadership guide is designed to give you the tools necessary to enhance and enjoy your volunteer experience.

As we embark on a journey to raise \$150 million for the College, we will need your help and guidance. This campaign is our most ambitious fundraising goal ever and our efforts will provide support for the core needs of the College. Working with the academic leaders and staff, together we will ensure a bright future for Baruch.

On behalf of the College, please accept our deepest gratitude for your commitment and willingness to make *Baruch Means Business* a success.

Sincerely,

Mark Gibbel
Vice President for College Advancement

ABOUT THE CAMPAIGN

While tuition soars at most American universities and states reduce their support of public higher education, Baruch College holds true to a century-old ethic of providing an affordable pathway to success for bright, deserving students. Mirroring the diversity of New York City, Baruch's student body includes many children of immigrants who are the first in their families to attend college. These students believe that a quality education is the best opportunity for them to be successful in an increasingly competitive world.



The campaign for Baruch College focuses on attracting private investment and leverages the considerable resources of our publicly financed infrastructure. This campaign will support student excellence and opportunity, the strengthening of our flagship Zicklin School of Business, and enhancing the value of the Baruch degree.

We pledge to invest in our students, faculty, curricula and educational models that make Baruch a paragon of excellence among the nation's public urban colleges. With its profound transformational power, Baruch provides a bridge to success for those who could not otherwise afford to succeed.

The average income of a Baruch student's family is approximately \$44,000 annually. Upon graduation, the average student earns more than that amount; taking one more step towards career and financial success.

CAMPAIGN PRIORITIES

STUDENT EXCELLENCE & OPPORTUNITY

- Student Support
- Scholarships
- Student Life

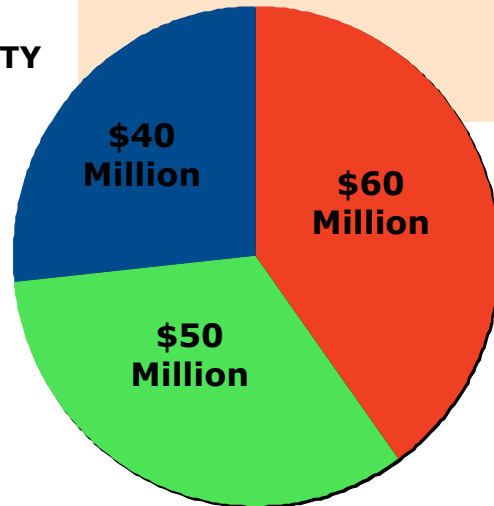
A NATIONAL REPUTATION

- Zicklin School of Business Academic Programs
- Faculty Excellence
- Enhanced Support for Centers and Institutes

ENHANCING THE VALUE OF A BARUCH DEGREE

- Weissman School of Arts and Sciences Academic Programs
- School of Public Affairs Academic Programs
- The William and Anita Newman Library and Technology
- Raising Baruch's Visibility and Enhancing Alumni Relations

**Raise
\$150 Million**



CAMPAIGN OBJECTIVES

- **Initiate "Baruch Means Business" Capital Campaign**
- **Secure \$150 million in gifts and pledges**
- **Raise the market value of The Baruch College Fund from \$100 million to \$200 million**
- **Double the percentage of alumni supporting Baruch to 15% annually**
- **Increase annual private philanthropic support of the College's operating budget to twice the amount**
- **Triple corporate and foundation support**

YOUR ROLE as a Campaign Volunteer

You are an important representative of Baruch College, and your involvement is critical to the success of our campaign.

Volunteers help by:

- **Being informed** about the College's campaign goals and priorities.
- **Generating awareness** of the campaign among peers.
- **Identifying** prospective donors.
- **Participating in meetings**, prospect review sessions, and special events.
- **Assisting in development** of strategies for potential donors.
- **Helping enlist** additional volunteers.
- **Communicating** closely with the advancement team.
- **Following the strategy** for prospective donors, including soliciting for campaign contribution.
- **Making a personal** campaign gift.

KEYS TO VOLUNTEER SUCCESS

Think why someone you know would be willing to support the College.

Be familiar with the College, its plans, goals and priorities.

Confer with staff on donor strategies.

Let us know what you're doing.

Keep your sights high.

Be proud of your role.

Raising funds in a campaign of this magnitude is a team effort among volunteers, academic leaders, and the advancement team.

Volunteers are invaluable.

They provide the "seal of approval" by lending the College their time, names and reputations. This personal involvement makes volunteers uniquely capable of helping us to identify new potential donors and to educate others about the College and its activities.

MEETING WITH POTENTIAL DONORS

BEFORE

- **Be prepared to discuss your own gift.** You may be asked to share the story of your own involvement and commitment to Baruch.
- **Consult with the advancement team.** We will help you strategize and plan, and provide information about your contact's involvement and any prior giving history with the College.
- **Have some specific goals for the conversation.** For example, invite to an alumni event, offer a campus tour, discuss philanthropic work, ask for a scholarship gift, etc.

AFTER

- **Contact the advancement team.** Discuss, analyze, and review the results of your meeting.
- **Personally acknowledge a gift you helped secure.** All gifts are acknowledged by the College, but you may wish to thank a donor you personally solicited. The advancement team can assist you.

WHAT TO SAY AFTER HELLO

How recently have you been back to the College?

What kind of a relationship do you have with the College?

What was your most memorable experience at Baruch?

What causes do you support? How could Baruch become one of them?

If you could do anything for Baruch College, what would you do?

Is the College in your estate plan?

DURING

- **Ask.** Open-ended questions allow you to learn more about the donor. (See above.)
- **Share.** Connect with donors by telling your story; many alumni have similar Baruch experiences.
- **Listen.** Donors often have questions and raise objections.
- **Clarify.** Help donors understand their options and ways to give. If contributions are made on the spot, checks should be made out to: *The Baruch College Fund*

FREQUENTLY ASKED QUESTIONS

WHY IS PRIVATE SUPPORT NECESSARY FOR A PUBLIC INSTITUTION?

Public colleges have seen a decline in their federal and state funding appropriations as other needs command a larger portion of public resources. Higher education cannot expect to receive support for anything beyond basic necessities. We have an obligation and opportunity to shape public education and still remain accessible to bright and deserving students from all backgrounds.

WHY LAUNCH A CAMPAIGN NOW?

The silent phase of the campaign began on July 1, 2006. Baruch's academic leaders, faculty, volunteers, and advancement team have been securing leadership gifts that provide the foundation for the overall success of the campaign. These gifts focus on support from trustees, key volunteers, and the College's most generous and engaged donors. The public launch— held April 28, 2009— was announced at our annual Bernard Baruch Dinner to thank early supporters, to unveil the objectives of the campaign to a broader constituency, and to invite further investment from alumni and friends.

Even in this state of economic uncertainty, many individuals and organizations continue to invest in the College's vision and mission. We cannot disrupt this momentum, particularly as need for private support has increased due to reduced public funding. If anything, we must intensify our activities and reach more Baruch alums and friends.

HOW WILL OUR ALUMNI AND FRIENDS LEARN ABOUT THE CAMPAIGN?

The silent phase of the campaign ended with the public announcement on April 28, 2009. We will keep our alumni, friends, and donors informed about the importance and positive impact of their philanthropic support through media stories, our publications, e-newsletters, e-blasts, social media networks, alumni events, and a special section on our website (www.baruch.cuny.edu/campaign).

WHO HAS THE CAPACITY TO MAKE A SIGNIFICANT GIFT?

One of the best indicators of "capacity" is philanthropic giving to other causes and organizations. The advancement team has information available about a donor's giving history and capacity.

(continued)

HOW CAN ONE MAKE A GIFT TO THE CAMPAIGN?

The process of giving to Baruch College is the same as it has always been. Gifts can be made in cash, stock, and other assets. (Please refer to "Gift Vehicles.") All gifts should be made out to: *The Baruch College Fund*

CAN A DONOR REQUEST HOW THEIR GIFT IS TO BE USED?

Donors may support a particular school, program, or purpose such as student or faculty support. However, unrestricted funding is the most important as it allows gifts to be used in areas of vital need.

WHO HAS A CONNECTION TO BARUCH THAT CAN BE STRENGTHENED?

You can review lists of potential donors provided by the advancement team to see who you might know, or perhaps you have former classmates, business associates or friends that you would like to connect to the College. You can host a luncheon or an event to connect potential donors with academic leaders and staff, or you can have one-on-one meetings to strengthen a relationship or to solicit a gift.

HOW WILL DONORS BE RECOGNIZED?

Throughout the campaign and beyond, we will be diligent in our efforts to ensure donors have a positive giving experience. We will recognize donors through our giving societies, special events, honor roll, and campaign website. Donors have the option to remain anonymous, should they wish.

DO ALL GIFTS COUNT FOR THE CAMPAIGN?

All new gifts received since July 1, 2006 have been counted towards the campaign.

DO CAMPAIGN GIFTS NEED TO BE PAID AT ONCE?

Donors may pledge a gift to the College and make payments over several years. (A payment schedule will be worked out.)

ARE CAMPAIGN GIFTS TAX DEDUCTIBLE?

Contributions to the College are tax deductible in accordance with federal standards and we provide authorized receipts for tax recording purposes.

OUR PLEDGE TO YOU

*Your accomplishments
as a volunteer are
tantamount to the
success of the campaign.*

- 1. Work collaboratively with you to secure gifts and pledges:**
 - Translating comments, suggestions, and ideas into action
 - Devising and implementing prospect strategies
 - Partnering with volunteers on solicitations
 - Stewarding donors to encourage future gifts
- 2. Provide necessary administrative assistance:**
 - Helpful background information and materials for your meetings
 - Event and meeting coordination
 - Assist with correspondence, including letters and gift acknowledgments
 - Proposal development
- 3. Develop communication messages as needed and provide available collateral materials.**
- 4. Monitor and report campaign progress.**
- 5. Appreciate and acknowledge the efforts of volunteers.**

**The Office of College Advancement will support, guide,
and assist our volunteers.**

Build Relationships, Share the Vision, Partner Together.

GIFT VEHICLES

The intent of counting and reporting is to reflect the total impact of fundraising efforts, including all gifts, pledges, and deferred gifts. Gifts can be made with a credit card, check, electronic funds transfer, or even appreciated stock. Deferred gifts can provide income for the donor and family, create tax benefits, and leave an important legacy.

WHY PEOPLE GIVE TO BARUCH

Donors are driven by positive motives:

- To express deep-seated values
- To preserve what they hold dear
- To “give back”
- Belief in the College’s mission
- To help others and/or effect change
- To memorialize or honor a loved one
- Recognition

(While there are often significant tax advantages when making a philanthropic gift, very few donors give solely for tax considerations.)

OUTRIGHT GIFTS

- Cash, checks, credit cards
(online giving available: www.baruch.cuny.edu/campaign/give-to-baruch.html)
- Marketable securities
- Closely held stock
- Gifts in kind (other than real or personal property)
- Corporate matching gifts
- Real or personal property
- Realized planned gifts

PLEDGES (MULTI-YEAR PAYMENT OPTION)

IRREVOCABLE DEFERRED OR PLANNED GIFTS

- Charitable gift annuities
- Charitable remainder trusts
- Charitable lead trusts
- Life insurance
- Life estate gifts

REVOCABLE DEFERRED OR PLANNED GIFTS

- Bequest provisions
- IRA or other qualified retirement plan beneficiary designation
- Insurance plan beneficiary designation