Campaign Volunteer Toolkit

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Let your heart feel for the afflictions and distress of everyone, and let your hand give in proportion to your purse.
—George Washington

THE GEORGE WASHINGTON UNIVERSITY
WASHINGTON, DC
Our Pledge to You
“Deeds, not Words” —George Washington

As you begin your work as a volunteer for Making History: The Campaign for GW, know you are not alone. The Division of Development and Alumni Relations will support and guide you through the process of identifying, cultivating, soliciting, and stewarding principal/major gift donors.

Our responsibilities

Provide information and materials needed for visits and conversations:
• Brochures, newsletters, magazines across schools and units
• School and unit campaign case statements
• One-page snapshots of school and unit priorities and university-wide initiatives
• Campaign stationery and templates

Assist with administrative tasks:
• Meeting coordination and follow-up
• Track donor interaction in development database
• Campus visits
• Event logistics
• Campaign updates

Collaborate on strategy:
• Offer insight on donor interests, capacity, and background
• Provide helpful background information about donors and prospects
• Participate in prospect meetings
• Identify opportunities for senior leadership meetings
• Identify appropriate cultivation events for prospects
• Help coordinate tours of campus and new buildings

Coordinate post-gift activities:
• Help contribute to stewardship plans
• Advise on appropriate media coverage opportunities

Keep in touch:
• Share campaign progress and news
• Invite you to campus for events and meetings
Your Role as a Campaign Volunteer

*Making History: The Campaign for GW* is an exciting time in the life of the university. The enthusiastic participation of our volunteers is critical to achieving our ambitious campaign goals and laying the foundation for moving into the group of truly elite institutions. Thank you for your commitment. Let's make history!

**Your purpose:**

To work closely with university and school/unit leadership, development officers, and Division of Development and Alumni Relations staff to help identify, cultivate, and solicit major and principal gifts to the *Making History* campaign.

**Your qualifications:**

- Your philanthropic support.
- Your advocacy for GW in your personal and professional life.
- Your ability to inspire others.
- Your demonstrated interest in GW’s success and growth.

**Your responsibilities:**

- To set an example to others.
- To understand GW’s strategic plan and campaign priorities, especially those of your specific school or unit.
- To identify prospects and help create a strategy to engage them.
- To attend or host cultivation events to further relationships with major prospects.
- To collaborate with GW’s development officers to identify giving opportunities tailored to a donor’s area of interest.
- To provide leadership to your school/unit by sharing best practices, success stories, and creative ideas to bring in gifts.
- To use your collective knowledge and influence to engage more volunteers in the life of the university.
Tips for Active Listening

There are five key elements of active listening. They all help you ensure you hear the other person, and that the other person knows you are hearing what he/she says.

1. Pay Attention

Give the speaker your undivided attention, and acknowledge the message. Recognize that non-verbal communication also “speaks” loudly.

2. Show That You're Listening

Use your own body language and gestures to convey your attention.

3. Provide Feedback

Our personal filters, assumptions, judgments, and beliefs can distort what we hear. As a listener, your role is to understand what is being said. This may require you to reflect what is being said and ask questions.

4. Defer Judgment

Allow the speaker to complete his/her thoughts to ensure you capture full understanding of the message.

5. Respond Appropriately

Active listening is a model for respect and understanding. You are gaining information and perspective. You add nothing by attacking the speaker or otherwise putting him/her down.

Bonus tip:

Good communication skills require a high level of self-awareness. By understanding your personal style of communicating, you will go a long way towards creating good and lasting impressions with others.

Adapted from www.mindtools.com/CommSkill/ActiveListening.htm
Active Listening Starts with Asking Questions

Questions about GW:

How did you/your child/your grandchild choose GW?
What were some of your best experiences as a student here? What is your child/grandchild enjoying the most?
When were you on campus? What brought you back? What were your impressions?
In what positive ways has GW influenced your/your child's life?
Which faculty members/administrators made an impact on your life or are currently making an impact on your child/grandchild's life?
With whom are you still in touch?
How do you feel about GW today? What do you know about us?
Why do you support GW? Why have you supported GW in the past?
I noticed you haven't supported GW in a number of years. What changed for you?
What do you believe are the perceptions of GW in the community? Region? Nationally?
What are your impressions of our vision for the future?
What inspired your recent gift to us?
How do you feel about the gifts you make to GW?
Do you believe your gifts to us are making a difference? If so, how?
To what degree do you feel we use your investments wisely?
What is your impression of our board and council groups?
What is your sense of our board's reputation within the community? Among our alumni? Parents?
What are your impressions of our publications?
Do you have any particular concerns you would like me to share with President Knapp?
Do you feel you know President Knapp and trust his leadership?

Questions for your network:

Who among your classmates (fellow parents, grandparents) do you still see or speak to on a regular basis?
How else do you stay connected?
How else might we connect with our young alumni/alumni of your era/parents?
What is the best way to connect with you?

Adapted from Asking Strategic Questions © The Osborne Group, Inc.
Ways to Volunteer

Ambassador

Provide introductions

Open doors for contacts and prospects to begin a relationship with GW

Host informational dinners and receptions with your contacts

Spread knowledge, enthusiasm, and expertise about GW
  • Read and absorb the university, school, and unit case statements
  • Develop your personal message about GW and Making History

Steward relationships
  • Write follow-up notes, cards, and letters to keep the relationship going
  • Make thank-you calls after visits and meetings

Advocate

Represent GW at public functions

Work with Development and Alumni Relations staff to engage prospective donors
  • Go on visits with Development and Alumni Relations staff and university leadership
  • Serve as a communication channel for your donors and prospects
  • Provide information that helps build relationships between GW and donors

Host appreciation dinners

See role of ambassador above

Asker

Participate in solicitations when appropriate

Make follow-up phone calls

Help craft solicitation letters
Campaign Frequently Asked Questions

What is a campaign?

- A comprehensive campaign is a universitywide effort to solicit gifts that support the university’s vision and priorities identified in the strategic plan, Vision 2021. The goal of Making History: The Campaign for GW is to generate gifts for current operations, permanent endowment, and capital purposes that will make a fundamental difference in our communities and our world. Campaign fundraising supports students, enhances academics, and breaks new ground through research and capital investments.

- Campaigns engage every constituency of the university and provide opportunities for prospective donors to align their areas of interest with a university priority within their financial capacity. The campaign will work to increase awareness of the aspirations of the university as well as the financial objectives required to meet these goals, and aims to attract an increased flow of gifts and commitments from trustees, alumni, parents, students, grateful patients, friends, corporations, foundations, and organizations. Ultimately, the campaign will broaden the university’s base of support and enhance its long-term, sustainable fundraising capacity.

What is the significance of the name “Making History”?

- Naming our campaign “Making History” captures the unique impact and extraordinary potential of the GW experience. While other universities talk about changing the world, our students and faculty have unique opportunities to do so. They have access to intensive learning experiences both inside and outside the classroom, and extraordinary access to powerful people and institutions. GW students are able to take knowledge and put it to work immediately through our vast network of internships, partnerships, and policy-changing research initiatives. At GW, students aren’t merely inhabitants of Washington, D.C.—they are eyewitnesses to and participants in history. “Making History” captures that idea, and the campaign and financial support it engenders play a critical role in actualizing our potential and enabling GW to continue to “make history.”
What’s the difference between a campaign and normal fundraising every year?

- A campaign provides a discipline for establishing priorities and creates excitement, intensity, and a series of deadlines that serve to motivate. Bringing together the university community around a campaign generates pride, enthusiasm, and energy, and serves to increase an overall sustained level of giving. A campaign also builds greater sustainable fundraising capacity for the long haul.

How much money is the campaign going to raise, and what will it support?

- Our overall goal for the campaign is to raise $1 billion over seven years (FY ’12-FY ’18). Overall campaign priorities include supporting students, enhancing academics, and breaking new ground through research and capital investment.

How much money has been raised to date?

- The official start date of the campaign was July 1, 2011, and we have been operating in the exploratory or “silent” phase to date. During this time, emphasis has been on defining campaign strategy and developing our case for support at the university and school/unit levels; building our fundraising infrastructure; ensuring staff and volunteer leadership and resources are in place; testing the feasibility of the campaign goals; and enlarging our pool of prospective donors. Another key requirement has been securing gifts that give us a strong philanthropic foundation on which to build the campaign. As of March 2015, more than $700 million has been raised toward our $1 billion goal.

Has GW ever had a campaign before?

- GW has completed two prior comprehensive campaigns. The first campaign, the “Campaign for George Washington,” ran from 1985 to 1990. It raised a total $84 million; $9 million more than the overall campaign goal of $75 million.

- Most recently, GW undertook the “Centuries Campaign” which was publicly launched in February 1996 with an initial goal of $300 million by 2000. By October 1998, approximately 75 percent of the $300 million goal had been raised. As a result, in October 1998, the GW Board of Trustees increased the overall campaign goal to $500 million and extended the campaign’s completion date from 2000 to June 30, 2003. By its conclusion, the “Centuries Campaign” (1993-2003) raised a total of $552 million for the university.
Why is GW launching a campaign now?
- The university has made great strides toward raising its stature, increasing selectivity, enhancing research, and investing in students, faculty, and infrastructure. Today, we are at a critical juncture. We have evolved into one of the nation’s leading universities and have laid the foundation for moving into the group of truly elite institutions. To advance, we have created a strategic plan that reflects our aspirations to provide a unique, rigorous education to every one of our students and to secure our position as one of the world’s premier research universities. The funding of this ambitious plan includes an unprecedented comprehensive philanthropic campaign.

What is the size of GW’s endowment?
- GW’s Endowment consists of the Pooled Endowment (the vehicle in which the vast majority of endowment gifts are invested), separately managed funds, and a portfolio of real estate properties. The Pooled Endowment is made up of approximately 1,195 individual endowment funds, most of which are designated to provide perpetual financial support for scholarships, professorships, academic and research programs, libraries, and other endowed programs.

- Approximately 62 percent of the endowment benefits the university as a whole, with the remainder earmarked for individual schools. As of June 30, 2013, the value of GW’s Endowment was $1.375 billion (an increase of $69 million over the previous fiscal year).

How does GW’s tuition and financial aid compare to other schools, and how will the campaign support making GW more accessible?
- Since 2007, GW has increased the amount of financial aid to undergraduates by one-third, offering more than $160 million in assistance this year and providing an average per-student, need-based award of more than $29,000. We support nearly two-thirds of all undergraduate students with need- or merit-based financial assistance. GW has also established scholarship and fellowship programs for students in graduate and professional programs.

- Funds raised through the campaign will enable us to meet a higher proportion of financial need and make a GW education accessible to a broader group of extraordinary students. With a quarter of funds from this campaign dedicated to the Power & Promise student aid initiative, GW will make tremendous strides in ensuring cost is not a barrier for the best and the brightest students.
Endowments and Named Gift Opportunities

Gifts to the University’s Endowment

The donor’s gift is invested in perpetuity as part of the university’s endowment fund. Endowment gifts can be pledged and paid over a period of up to five years. The minimum gift required to establish a named endowment fund is $100,000; gifts of less than $100,000 that are designated for any of the priorities below on an outright, non-endowed basis are welcomed. Gifts can be made to the endowment to fund a number of university priorities. Some examples:

<table>
<thead>
<tr>
<th>Naming Opportunity</th>
<th>Endowment</th>
<th>Current Use/Annual Income Equivalent*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deanship in a College or School</td>
<td>$10 million</td>
<td>$500,000</td>
</tr>
<tr>
<td>Department or Department Head</td>
<td>$5 million</td>
<td>$250,000</td>
</tr>
<tr>
<td>University Professorship</td>
<td>$5 million</td>
<td>$250,000</td>
</tr>
<tr>
<td>Professorship, Coach, Library Curator</td>
<td>$2.5 million</td>
<td>$125,000</td>
</tr>
<tr>
<td>Assistant or Associate Professorship</td>
<td>$1 million</td>
<td>$50,000</td>
</tr>
<tr>
<td>Visiting Professorship</td>
<td>$1 million</td>
<td>$50,000</td>
</tr>
<tr>
<td>Full-Tuition Scholarship or Fellowship</td>
<td>$1 million</td>
<td>$50,000</td>
</tr>
<tr>
<td>Faculty Research Fellowship</td>
<td>$500,000</td>
<td>$25,000</td>
</tr>
<tr>
<td>Professorial Lectureship</td>
<td>$500,000</td>
<td>$25,000</td>
</tr>
<tr>
<td>Research Professorship</td>
<td>$500,000</td>
<td>$25,000</td>
</tr>
<tr>
<td>Lectureship</td>
<td>$250,000</td>
<td>$12,500</td>
</tr>
<tr>
<td>Research or Education Fund in Specified Discipline</td>
<td>$100,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>Faculty Excellence Fund/Award/Prize</td>
<td>$100,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>Acquisition or Preservation Fund</td>
<td>$100,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>Partial-Tuition Scholarship</td>
<td>$100,000</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

For naming opportunities for the university’s new facilities, please reach out to your Development and Alumni Relations contact.

Examples:
Dr. Lynn R. Goldman is the Michael and Lori Milken Dean
The Nelson and Michele Carbonell Engineering Scholarship
The Oscar and Shoshana Trachtenberg Faculty Prize Scholarship
J.B. and Maurice C. Shapiro Chair in Media and Public Affairs
Weintraub Professorship Fund

*The naming opportunities for endowed gifts maybe available on a year-to-year or multiyear basis for a current use gift equivalent to the expected annual endowment payout. Example: a payout rate of 5% (variable, as established by the board), a named, endowed scholarship of $100,000 will pay out approximately $5,000 per year.
Ways to Give

There are many ways to make a tax-deductible contribution to the George Washington University. In all cases, you can designate your gift to the school or program of your choice or to one of our current initiatives.

Cash, Check, or Credit:
Give by credit card at www.gwu.edu/give2gw or call 800-789-2611.

Gifts made by check should be payable to The George Washington University and mailed to:

The George Washington University
2100 M Street, NW, Suite 310
Washington, D.C. 20052

More Giving Options:

Planned Giving: Gifts of stock, real estate, and tangible personal property, as well as bequests and other planned gifts, provide tax benefits or even a fixed stream of income for you and GW.

Endowed Gifts: Gifts of all kinds may be designated for immediate or current use or as a long-term investment through an endowment.

Matching Gifts: Your employer may match your charitable gift, doubling your impact on GW students.

Gifts of Real Estate: By donating real estate to GW, you can achieve peace of mind, create a lasting legacy, and receive financial benefits for yourself or someone else.

Gifts of Stock and Securities: A gift of stocks or securities to GW can be arranged via electronic transfer or by receipt of stock certificates. The gift provides a full income tax deduction, negates capital gains tax, and may also avoid estate taxes.

To learn more, visit giving.gwu.edu/how-give.
Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

1. To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization’s governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization’s most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgment and recognition.
6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

The text of this statement in its entirety was developed by the American Association of Fund-Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP), and adopted in November 1993.
Development and Alumni Relations Contact Information

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Glossary of Campaign Definitions

active phase: (also public phase) the period of public solicitation during a campaign that usually follows the successful completion of a campaign's nucleus fund and the establishment of a pattern of giving. This phase consists of solicitation activity in contrast to campaign planning.

annual giving: 1. an amount given annually. 2. a fundraising program that generates gift support on an annual basis.

campaign: (noun) an organized effort to raise a specified amount of money for a particular purpose in a specified period of time.

comprehensive campaign: an organized fundraising effort to raise a specified amount of money for the broad needs and opportunities of an entire institution in a specified period of time. Such campaigns are designed to feature high-priority university goals, with intensive fundraising efforts focused on their achievement.

cultivate: to engage and maintain the interest and involvement (of a donor, prospective donor, or volunteer) with an organization's people, programs and plans.

current asset: cash, including accounts receivable, merchandise, or the like that can be converted into cash within a relatively short period of time.

current giving: current gifts in support of an organization's operations.

donor: a person, organization, corporation or foundation that makes a gift.

endowment: a permanently restricted net asset, the principal of which is protected and the income from which may be spent and is controlled by either the donor's restrictions or the organization's governing board.

exploratory phase: (also quiet phase) the quiet, non-public period during a campaign in which the study is conducted, the case is developed, and the process of recruiting volunteers and identification of prospects takes place.

gift: donation.

gift acceptance policy: the rules and regulations developed by a donee organization to determine which types of gifts should or should not be accepted.

Continued on back
Glossary of Campaign Definitions (cont.)

gift planning: (also planned giving) a systematic effort to identify and cultivate a person for the purpose of generating a major gift that is structured and that integrates sound personal, financial, and estate-planning concepts with the prospect’s plans for lifetime or testamentary giving. A planned gift has tax implications and is often transmitted through a legal instrument, such as a will or a trust.

identify: (verb [with object]) to ascertain, through investigation, research and analysis (those candidates who appear to be the most promising as prospective leaders, workers, or donors). (noun) identification.

leadership gift: a gift, donated at the beginning of a campaign, that is expected to set a standard for future giving.

major gift: a significant donation to a not-for-profit organization, the amount required to qualify as a major gift being determined by the organization.

pledge: (noun) 1a. a promise that is written, signed, and dated, to fulfill a commitment at some future time; specifically, a financial promise payable according to terms set by the donor. Such pledges may be legally enforceable, subject to state law. 1b. the total amount of such a pledge. 2. a verbal pledge. (verb [with object]) to commit (a specified amount of money) as a pledge.

pledge payment: payment of all or a portion of a pledge.

principal gift: a significant donation to a not-for-profit organization, the amount required to qualify as a principal gift being determined by the organization.

prospect: any potential donor whose linkages, giving ability, and interests have been confirmed.

solicit: (verb [with object]) 1a. to ask (a person or group) for a contribution of money, resources, a service or opinion. 1b. to request or try to acquire (such a contribution). (verb, [no object]) to make a request or appeal as for such a contribution.

stewardship: (noun) 1. a process whereby an organization seeks to be worthy of continued philanthropic support, including the acknowledgment of gifts, donor recognition, the honoring of donor intent, prudent investment of gifts, and the effective and efficient use of funds to further the mission of the organization. 2. the position or work of a steward.

from the Association of Fundraising Professionals