



**WOMEN & PHILANTHROPY AT
THE COLLEGE OF WILLIAM & MARY**

REPORT AND PLAN

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EXECUTIVE SUMMARY

The Women & Philanthropy Initiative focuses on how the College of William & Mary engages alumnae and how it interfaces with the whole alumnae/i body. By adapting practices and procedures to more deeply involve women, William & Mary (W&M) will transform its culture and establish communication, engagement, and fundraising practices that more effectively resonate with different constituency groups. This will result in more fully engaged alumnae/i, who are committed to W&M mentally, emotionally, and philanthropically.

National research indicates that women are stepping into their economic and philanthropic power like never before. Women not only earn more now, but they are also projected to inherit 70% of intergenerational wealth in the next 50 years. Additionally, women have very distinct motivations and approaches when it comes to philanthropy and charitable giving. Women are more deliberate in their philanthropy than men. They expect a deeper level of communication and want to be actively involved with an organization they support, including their alma mater. Women also wield significant influence over philanthropic decisions in their own households. Finally, research shows that these philanthropic preferences are echoed by millennials and underrepresented groups. Like women, these groups are attracted to forward thinking organizations that communicate context and impact and that ask for their input and experience. Institutions that purposefully design communications and programs to capture women's cares, concerns, and commitment are invigorated by women's engagement and philanthropy as well as that of underrepresented groups and the next generation.

At W&M, a fundraising culture and infrastructure more attuned to the full strength of the alumnae/i body is a key lever for a stronger future. Several factors suggest that this as an opportune time for a comprehensive initiative to engage alumnae.

- More than half of the undergraduate student body (55%) and living alumnae/i body (52%) are women.
- Though a higher proportion of women than men are giving to W&M, women are contributing fewer dollars than their male counterparts.
- In 2018, William & Mary will celebrate the 100th Anniversary of the admission of women at the College. This is an opportunity to showcase successful women leaders and philanthropists and to celebrate the role women play at W&M.
- The success of the current campaign will require the support of the *full* alumnae/i community. In order for W&M to reach its campaign goals, women – more than half of the alumnae/i community – must participate at the highest levels.
- Recent changes in University Development – new leadership and expanded resources – make implementation and integration of this initiative possible.
- Academic and administrative leadership are supportive of the Women & Philanthropy Initiative and see the opportunity and need to engage the College's full alumnae/i talent.
- The College of William & Mary Foundation is committed and has stayed abreast of this work since 2012 when the Development Committee established a Task Force to research the potential.

In order to leverage these assets and ensure that the effort is comprehensive, it is recommended that the Women & Philanthropy initiative be structured as an integrative model. This means that, rather than establish a standalone women's program, the initiative will be integrated across W&M's culture, led by a group of champions across campus. The specific strategies these champions will implement are:

1. *Campus Commitment & Integration*: Ensure sustained leadership support with human and financial resources, significant training, and creation of metrics to track and fully integrate the initiative across W&M.
2. *Inclusive Communication*: Audit and transform W&M's communication to be inclusive of women. Consistently showcase the leadership and success of W&M's women – students, faculty, staff, and alumnae.
3. *Substantive & Personalized Engagement*: Design significant and impactful ways through which women can engage with the College. Ensure that there are a range of opportunities for different life styles and stages (e.g. include “short shot activities” like task forces and speaking in classes).
4. *Alumnae Leadership*: Create a system to identify, recruit, and groom women for volunteer leadership roles at W&M.

Taken together, these efforts will lead to broad cultural change. Women's engagement with and philanthropy for W&M will increase, and more inclusive communication and fundraising practices will result in deeper engagement methodologies for all stakeholders. Below is a visualization of these recommendations.



The ultimate goal of this effort is to create a culture of change that results in a more committed and engaged alumnae/i body and a stronger foundation for philanthropy that grows W&M's major gift pipeline. To do this, W&M must first connect meaningfully with women. Women will bring their time, talent, and financial support to W&M, as well as the men and families in their lives.

Connecting with women in ways that align with their preferences takes effort and will require investment of resources. This is undoubtedly the right investment for two reasons. First, other women's programs have reaped the benefits of significant increased giving, and there is every indication that W&M will see early results, as well. Second, failure to invest is to ignore a societal phenomenon. Just as W&M's student population has shifted, women will continue to outpace

men in educational attainment. Despite glass ceilings, women will continue to grow their incomes.

Now is the time to invest in the culture and communication changes required to integrate women more fully across all of W&M. This adaptation of culture and practices will not only lead to the deeper commitment of alumnae but also of underrepresented groups and the next generation.

PROJECT OVERVIEW

RATIONALE FOR WOMEN & PHILANTHROPY AT WILLIAM & MARY

Societal changes have economically empowered women as wage earners, business owners, investors, and inheritors.¹

- Nearly half of the top wealth holders in the U.S. are women, including more than 3 million women with annual incomes greater than \$550,000.
- Since women live for an average of 5.2 years longer than men, women are projected to inherit 70% of intergenerational wealth in the next 50 years.

Simultaneously, nationally women are stepping into their philanthropic power.

- Single women give almost twice as much as single men, and married women give significantly more than both single and married men.
- Women are increasingly philanthropic decision makers. In nearly 90% of high net-worth households, women either are the sole decision maker or an equal partner in decisions about charitable giving.
- Research shows that women direct their largest share of giving (31% of \$1.6 billion) to educational, medical, or scientific organizations.

In light of these changes, many educational institutions are recognizing the untapped philanthropic potential of their female constituents and are reaping rewards from programs that engage women, starting from when they first step on campus as students or friends and continuing throughout their lives.

William & Mary Landscape

Women have a strong and visible presence on campus. Women at William & Mary currently make up:²

- 55% of the current undergraduate student body; and
- 54% of the current graduate student body.
- Before 2000, women made up 37% of the student athletes. After 2000, women represent 48%.

Women continue to play a key role once they leave campus.³

- Women make up 52% of the living alumnae/i body.
- Overall, women have a higher donor participation rate (59%) than their male counterparts (56%).
- Generally, women make up a greater proportion of the W&M donor body than men; this is particularly true among younger alumnae/i.⁴
- Women comprise 46% of planned-giving donors and have provided \$20.6 million in bequests received by W&M since 1982.

¹ Source: Women, Money, and Philanthropy; Foundation Center WIP Presentation; sourced from Fem-anthropy: Women's Philanthropic Giving Patterns and Objectives, 2010; and Jewish Federation of North America, National Women's Philanthropy: Philanthropic Profile, July 2011.

² Source: William & Mary Common Data Set (2013-14),

http://www.wm.edu/offices/iae/institutional_research_reporting/cds/index.php.

³ Data provided by W&M Development Office to the Women & Philanthropy Task Force.

⁴ See Figure 1 in Appendix A for the donor pool by gender and class year.

- W&M has hosted 33 regional events since 2011, and at 24 of the 33 events (73%), alumnae participation exceeded alumni participation, ranging from 45% to 67%. At only six of the events (18%) alumni attendance exceeded alumnae attendance. Overall alumnae have comprised 51.2% of all attendees, with alumni at 38.1%, couples at 7.5%, and non-alumni at 3.2%.

Despite these positive trends, women are less visible than men in philanthropy at W&M. This is particularly striking given that over half of the students and alumnae/i body are women.⁵

- Women constitute just 30% of current W&M development prospect assignments, compared to the 53% that are men. (Alumnae/i couples (13%) and non-alumnae/i couples (4%) make up the balance of assignments.)
- Though a greater proportion of women give to W&M than men, women are contributing less than men, both in regards to the average and median size of their gifts: average and median gift size for women are \$355 and \$50 vs. \$724 and \$83 for men.
- This difference in average gift size is narrowing but still apparent with younger alumnae/i. The average gift size of a male graduate from 1980 is \$504, compared with just \$356 for female graduates.⁶
- Former female student varsity athletes are giving to the College and Athletics at lower rates and lower levels than their male counterparts. For classes graduating from 1950 through the 2000s, 19% of alumnae athletes gave to the College and Athletics vs. 28% of alumni athletes. These alumnae athletes gave a total of \$22.3 million vs. \$60.7 million from alumni athletes. W&M has seen an increase in the sports specific giving of young alumnae athletes, women who graduated in the 1990s and 2000s.

Additionally, though women comprise over half of the W&M student, alumnae/i, and donor bodies, women remain underrepresented in campus leadership.⁷

- Within the classroom, women comprise only 36% of the entire College faculty, as of November 2013. In four of the College's five schools, women constitute much less than half of the faculty: School of Arts and Sciences, 38% women faculty; Mason School of Business, 31% women faculty; Marshall-Wythe School of Law, 33% women faculty; Virginia Institute of Marine Science, 18% women faculty.
- Outside of the classroom, women have made up just 37% of leadership board participants since 2000. Of the 14 Chairs of the College of William & Mary Foundation since 1980, three have been women. At the Alumni Association only 11% of the presidents and 19% of Alumni Medallion recipients have been women. This reinforces the perception that W&M's leadership, both inside and outside of the classroom, is male-oriented.

W&M's fundraising efforts and its partnership with alumnae/i have been successful, yet not all alumnae/i are at the table in equal measure. Despite the overall generosity of the W&M community, many alumnae are choosing not to contribute to W&M to their full potential. While more alumnae contribute than alumni, alumnae tend to donate fewer dollars. Women also occupy fewer seats on the College's critical governing boards. Without the strength of W&M's alumnae/i community equally invested in its future, W&M's aspirations could well exceed its capabilities.

⁵ Ibid.

⁶ See Figure 2 in Appendix A for the difference in average gift size between men and women donors.

⁷ Ibid.

METHODOLOGY

To develop the best program model for the College to connect with women, The College of William & Mary Foundation created a Task Force on Women & Philanthropy and engaged Orr Associates, Inc. (OAI) to guide the development of the Women & Philanthropy Initiative and co-create a strategic plan for implementation.

TASK FORCE ON WOMEN & PHILANTHROPY

The Task Force on Women & Philanthropy was established by the Development Committee of the Foundation in May 2012. Staff assembled a group of seven highly regarded alumnae/i and friends of W&M.⁸ The Task Force is chaired by Elizabeth Cabell Jennings and Ellen Stofan. Staff leadership is provided by Lee Foster, Sue Warner, and Annie Davis.

The established purpose of the Task Force was to gain an understanding and appreciation of the relationships women currently have with the College and to arrive at best practices for future engagement, broadly and philanthropically. Between May 2012 and April 2014, these key volunteers met quarterly (either in person or by conference call) to accomplish this mission. The Task Force conducted a review of literature and facilitated valuable discussion and debate that provided the basis for many of this plan's findings and recommendations.

OUTSIDE COUNSEL

William & Mary's development staff engaged a team of consultants at Orr Associates, Inc. (OAI), under the leadership of Kathleen Loehr, a leading expert in the field of women and philanthropy. Ms. Loehr's expertise on women and philanthropy began in 1996 as Director of the President's Council of Cornell Women (PCCW). In 2005 she helped launch the Tiffany Circle at the American Red Cross, their first ever women-focused giving program, and has been a member of the Advisory Board for the Women's Philanthropy Institute at the Lilly School on Philanthropy (Indiana University) since 2008.

Now Senior Vice President and Managing Director at OAI, Ms. Loehr led the team of consultants that assisted with the development of the women's philanthropy initiative at Duke University, University of San Francisco, Drexel University, and National Geographic Society.

NATIONAL RESEARCH

William & Mary staff and OAI consultants reviewed available research on women in leadership and philanthropy, including recent landmark studies by both the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy and Bank of America Merrill Lynch.

OAI supplemented this research with a survey of similar initiatives by other leading universities and nonprofits, including in-depth investigation of the women's programs at:

⁸ See Appendix B for a list of the members of the Task Force on Women & Philanthropy.

Universities:

Cornell University
 Dartmouth College
 Princeton University
 University of Virginia
 University of Wisconsin

Nonprofits:

American Red Cross
 Jewish Federation of North America
 United Way

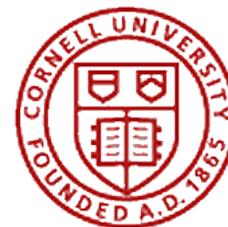
In the 26 years since universities began intentionally working to connect more deeply with women, institutional fundraisers have learned important lessons about building such programs. First, no one model works across all universities; each institution needed to create a program to suit its own culture. Additionally, initial program focus drove the outcomes. Three models, each with a different focus and corresponding results, are described below. In only one case, The University of Wisconsin, was philanthropy a major focus.

The University of Wisconsin on Philanthropy

The University of Wisconsin-Madison Foundation's women's philanthropy program, founded in 1988, was the first to focus on major gifts from women at a co-educational institution. In order to encourage women to publically give major gifts in their own names, the program includes regional programming, donor education forums, school/college/unit activities, and a women's funding initiative. The program's advisory group is led by the Women's Philanthropy Council, a 25 member leadership group with its chair serving on the University Foundation Board. Members are required to have given \$25,000 over their lifetime to join and \$2,000 annually. Since 1998, current and past Council members have given more than \$75 million to the University. Given that the first significant gift (over \$5 million) occurred in the program's eighth year, Martha Taylor, founding Director and the University's Vice President of Development, believes that if the initiative had been integrated across campus, it may not have taken as long to show results.

**Cornell University on Engagement**

The President's Council of Cornell Women (PCCW), formed in 1990 with less than 100 members, began in order to "engage leading alumnae by strengthening their ties to each other and to Cornell." Today there are 450 active members and 700 sustaining members. For 70% of members, this Council represents their first time reconnecting to Cornell since they left campus. While 78% of the women on the Council made a gift to Cornell last year, many gifts are small (\$100-\$500). The Council's primary objective continues to be engagement.

**The University of Virginia on Leadership**

Beginning in 2000, the University of Virginia (UVA) focused on increasing the number of women volunteer leaders on their campaign committee, school boards, and Board of Visitors. By 2006, they grew women's participation on most of these leadership bodies from 10% to over 30% by utilizing a "pass through" model: connecting women to UVA via various modalities, cultivating them and then nominating them for leadership positions. They noticed that giving from women also grew during this period, but they are unsure of the cause and effect. Given the early success of the program, UVA also began biennial Women in Leadership conferences in 2008. Since the staff person



leading this effort left the University in 2010, a lack of institutional commitment to continue the work has recently led UVA to review and redesign.

Each of these three programs successfully achieved its key objective, whether it was deeper engagement, more women leaders on campus, or increased philanthropy. It is noteworthy that the last two have not significantly increased sustained major giving from women, and the first program increased philanthropy, but only after a long period and without a corresponding increase in the number of women engaged on campus as volunteers and leaders.

Thus, the key takeaways on program design from this research are as follows.

- There is no one template for women in philanthropy programs; programs tend to cluster around whether the starting point is engagement, leadership and/or philanthropy.
- If philanthropy is a key goal, then philanthropy needs to be a major, and overt, objective from conception.
- A program should align with organizational culture and vision.
- Measuring outcomes is critical, yet few programs have done it.
- External champions are essential – they provide sustained pressure when there is internal change in staffing or priorities.
- Dedicated financial and human resources are required.
- Organizational culture/leadership are overwhelmed by the unleashed power of committed women unless they intentionally adapt or design engagement opportunities.
- It is important to integrate the programs engaging women with the rest of the organization.
- A mix of on-site and off-site events is effective to reach women where they are.
- An emphasis only on annual giving can result in not capturing the support of high net worth women.

INTERVIEWS WITH KEY STAKEHOLDERS

Between September and November 2013, OAI consultants conducted a series of in-depth interviews with W&M's key stakeholders. The goal of the interviews was to gather perspectives on W&M and the Women & Philanthropy initiative, and to identify opportunities for increasing the engagement, leadership and philanthropy of female stakeholders. OAI consultants spoke with 17 W&M alumnae.⁹

FOCUS GROUPS

In October 2013, OAI consultants and William & Mary's Director of Volunteer Management conducted a series of focus groups. Like the interviews, the goal of the focus groups was to gather wider perspectives on alumnae experiences and opinions on engagement, leadership and philanthropy. Participants were encouraged to interact with one another to draw out further viewpoints. A total of 15 alumnae participated in the three focus groups: one in-person meeting in New York, one in-person meeting in Washington, D.C., and one virtual focus group.¹⁰

⁹ See Appendix B for a list of interview participants and a summary of the topics covered in the interviews.

¹⁰ See Appendix B for a list of focus group participants and a summary of the topics covered in the focus groups.

ONLINE SURVEY

A key tool in gathering data for the Women & Philanthropy Initiative at W&M was a comprehensive online survey conducted over a 15-day period in October and November 2013. The survey targeted 4,581 alumnae of W&M from the classes of 2013 and earlier who fell into at least one of the following categories:

- Gave at least \$5,000 to the College in FY2012 or FY2013;
- Had a lifetime giving of \$100,000 or more;
- Rated at a capacity of \$50,000 to \$250,000;
- Had given to W&M for five or more consecutive years;
- Was a former student athlete rated at a capacity of \$25,000 or more;
- Was a former student athlete who gave to Athletics in FY2012 or FY2013;
- Currently serves on a W&M leadership board or advisory council;
- Was a past alumna member of the Board of Visitors, College of William & Mary Foundation, and/or William & Mary Alumni Association; and
- Was an alumna invited to participate in a Women & Philanthropy interview or focus group, but did not participate.

The survey yielded an 11.5% response rate, revealing statistical data on stakeholders' impressions of W&M, their preferences for engagement, their philanthropic motivations, their charitable giving patterns, and other experiential and demographic information. The survey also generated a wealth of narrative responses to survey questions.

The largest segment of survey respondents (27%) graduated between 1980 and 1989, and a majority (92%) earned a B.A., 76% from the School of Arts & Sciences. Of the 525 participants who completed the survey, 89% participated in a group or team during her time at W&M, with 61% reporting having participated in Greek life and 35% in varsity sports. Nearly all respondents were white (94%) and living in the U.S. (98%), and 41% of total respondents currently reside in Virginia.¹¹

¹¹ See Appendix C for the demographics of survey participants.

OVERVIEW OF FINDINGS

Findings from the interviews, focus groups and survey are structured around five primary themes:

- *Compelling Reasons*: Reasons for supporting The College of William & Mary, as well as reasons for supporting a women’s philanthropy initiative;
- *Engagement*: Alumnae’s sense of connection and engagement with W&M;
- *Leadership*: Perception of both administrative and volunteer women’s leadership at W&M;
- *Philanthropy*: Trends in giving to W&M and motivations for support and catalysts for increased giving; and
- *Development Operations*: Perception of W&M’s resources, systems and procedures for fundraising.

COMPELLING REASONS

Support of William & Mary

The majority of W&M alumnae (94%) reported having a positive experience as a student.¹² Further, the data shows a correlation between a “very positive” experience at W&M and being a self-reported major donor to the College. This indicates that alumnae give back to W&M because their time on campus was a positive one. Non-donors are more likely to have had a less positive experience as a student.

In addition to a positive student experience, alumnae choose to support W&M because they support the College’s mission. Survey results demonstrate the following as top motivations for giving:¹³

1. Support the mission of W&M;
2. Show gratitude for education received;
3. Impact future generations;
4. Honor academic excellence; and
5. Fund a specific project.

In short, alumnae choose to support W&M because they had positive experiences as students and because they believe in the College’s mission and value the quality of education.

Support for a Women & Philanthropy Initiative at William & Mary

Survey results indicate that alumnae believe that their time as students at W&M and their motivations for philanthropy are different than those of men. A large majority of survey respondents (87%) also indicated that they are interested in participating in women’s programming offered by the College in the future.

Given these statistics, it is not surprising that interview and focus group participants echoed support for a Women & Philanthropy Initiative that celebrates the College’s 100th Anniversary of

¹² See Figure 14 in Appendix D for a breakdown of “very positive” experiences by donor type.

¹³ See Figure 15 in Appendix D for detailed analysis of alumnae’s reported motivations for supporting W&M.

women at W&M and is inclusive with current efforts. One participant said: “*W&M has a lot of women with important positions in companies and the government. They have a lot to offer. Why not involve them? Not because they are women but because they are smart, different, and have new ideas.*” A participant echoed the sentiment and “*likes the idea of women coming together to have a great impact, especially in conjunction with the 100th Anniversary of women at W&M.*”

Some study participants expressed a desire for any women-focused initiative to be inclusive. As one interview participant said: “*I want to make sure we think about the women and men issue at W&M. It has to be William & Mary and not Mary & Mary. But that’s not a reason not to focus on women... we need to have a focus on women as they survive longer and there are more in the W&M community.*”

ENGAGEMENT

Current Engagement

For over 70% of alumnae survey respondents, social connections with other W&M alumnae/i – in person, online, and professionally – are the primary way that they engage with the College today. Further analysis shows that this type of personal engagement is correlated with higher giving to the College. Compared to the wider survey group, self-reported major donors¹⁴ are significantly more connected to W&M through personal connections like interacting with fellow alumnae/i in person, visiting campus, volunteering, and interacting with students.¹⁵ This is especially significant when compared to one-time donors or non-donors, who primarily engage with the College by following W&M news or interacting with alumnae/i online.

The number of connections the person has to the College is also important and correlated to level of giving. Major donors reported having a median six ways that they engage with the College, compared to just four for annual donors and two for non-donors.

Future Engagement

In line with their desire for personalized engagement, alumnae reported that they are most interested in participating in women’s programming and opportunities that allow them to engage with students (e.g. mentoring, speaking in a class) in the future.¹⁶ Regional events are particularly attractive to non-major donors.

Alumnae also noted the need for the College’s engagement opportunities to be sensitive to women’s life cycle. As one focus group participant said: “*It is hard with small children to have time to be involved with Boards. Now I am ready – there is that rhythm. What is the right re-entry point to get people involved when they have the time?*”

In addition to varied, tailored engagement opportunities, alumnae expressed a desire for deeper knowledge of W&M’s needs and vision to help them connect. One alumna noted: “*I don’t always understand where the College sees the biggest need... where is it that your money can have the biggest impact? Clarity around these issues would be helpful.*” Another participant echoed this sentiment: “*Give me something to get excited about. Give me something to give feedback on.*”

¹⁴ Survey participants selected which type of donor they considered themselves to be. The response options were: major donor, annual donor, special occasions donor, bequest donor, non-donor, or don’t know.

¹⁵ See Figure 16 in Appendix D for a complete breakdown of alumnae’s primary connections to W&M by donor type.

¹⁶ See Figure 17 in Appendix D for data on alumnae’s current and future engagement interests.

LEADERSHIP

Seeing that only a third of volunteer leaders and faculty members are women, there was a consensus among interview and focus group participants that there is room to grow more female leaders at W&M.

Alumnae also emphasized the need for W&M to intentionally ask women to step into leadership roles that are meaningful. One focus group participant said: “*Women need to be asked. It’s hard to step in not knowing what’s out there to help with.*” Similarly, a survey respondent suggested that the College should “*reach out to women for specific opportunities*” that may resonate more closely.

Others called for increased opportunities to step into leadership other than serving on a board. As one survey respondent said: “*Find meaningful projects that resonate with us and will engage us.*”

PHILANTHROPY

Extensive studies by national organizations have determined that “consciously or unconsciously, nonprofit fundraisers may rely on male giving patterns to reach all donors.”¹⁷ Donors are often asked to make a significant gift to meet a deadline (match other donors), to reach a goal (peer solicitation), or to join peers and give at the same or higher level (competition). Consequently, many organizations “either have misconceptions about female donors or they just continue to do things the way they always have, which many will admit does not work when it comes to engaging women.”¹⁸

W&M’s interview and survey data mirror the national research. The top factors that influence which organizations women support and motivates them to significantly increase the size of their gift are:¹⁹

1. **Personal connection:** as the greatest determinant of size of gift. A participant said her “*motivation comes down to the personal connection, being involved, and being asked to give.*”
2. **Engagement with the organization:** as the greatest catalyst for significantly increasing size of gift. A participant said her “*level of involvement is key to determining the size of my gift.*”
3. **Mission aligns with values:** as the most important factor in determining which causes to support. A participant said: “*For me, the catalyst was seeing the impact and receiving the information about how many lives are impacted.*”
4. **Impact of gift:** as an important determinant of gift size but lesser so. A participant said: “*Passion for the mission is important. I give to organizations that are deeply affecting me.*”

Additionally, study participants emphasized the importance of connecting with students and being informed about the impact of their gift once it is made; they want to hear and see that their donations are making a difference.

¹⁷ Bank of America. “The 2011 Study of High Net Worth Women’s Philanthropy.” January 2012. <http://www.bankofamerica.com/philanthropic>.

¹⁸ Fem -anthropy: Women’s Philanthropic Giving Patterns and Objectives.

¹⁹ See Figure 18 in Appendix D for the top factors that influence alumnae’s gift size.

When analyzing what causes donors to give to William & Mary, we find that the motivation varies based on the type of donor that they are. Funding a specific project matters most to major donors, while W&M's mission is the primary motivator for annual and special projects donors.²⁰

ANALYSIS OF ATHLETES, MINORITIES, AND CLASS YEAR

In addition to the broader analysis of W&M's alumnae responses, OAI completed an in-depth analysis of the responses from specific constituencies to garner additional findings. Specifically, this data review focused on race, class year, and student athlete participation.

Minorities

Due to the small sample size of non-white respondents to the survey (33 total respondents), no statistically significant conclusions could be drawn from this sample based on race. However, comparison of responses of non-whites to others reveals that minorities' responses are similar to those of the general survey sample as reported here.

Class Years

From the survey data, there was no statistically significant correlation between a woman's age and her self-identification as a major donor, annual donor, special donor, or non-donor. Therefore, cross-generational differences in philanthropic behavior could not be gleaned from this data set.

Athletes

Former female student varsity athletes are an important W&M alumnae constituency. Analysis of the responses from this group reveals that, on the whole, their perception and relationship with W&M is similar to the broader sample. However, there are some important and notable exceptions.

- **Compelling Reasons**

Female athletes support W&M for many of the reasons mentioned by the general survey sample. They report having a "very positive" experience as a student at the same rate (79%) as non-athletes, and report a slightly higher perception of the College today (79% compared to 78% for the general survey sample). Furthermore, while athletes agree that the mission of W&M is an important motivation for giving, they also consider honoring the College's athletic excellence far more often than general survey respondents (74% compared to 18%).

- **Engagement**

Current Engagement

Unsurprisingly, a higher proportion of female athletes said the groups/teams they participated in as students were a defining experience at W&M (87%) compared to non-athletes (66%). Additionally, athletes engage with the College in slightly varied ways compared to general survey respondents: they are more likely to interact with W&M coaches (24%) and follow W&M athletics (26%).

Future Engagement

Like non-athlete respondents, student athletes are most interested in participating in women's programming and student-focused activities (e.g. speaking in a class) in the

²⁰ See Figure 19 in Appendix D for the Motivator Predictive Model for Donor Type.

future.²¹ If anything, athletes are more enthusiastic about future personalized programming than non-athlete alumnae.

- **Philanthropy**

W&M female athletes showed little difference in the top factors that influence which organizations they support and in the size of their gifts. Like all survey respondents, personal connection was the greatest determinant of gift size. Unlike the general survey sample, athletes said that personal connection was the greatest determinant of whether they will increase the size of their gifts to an organization. The non-athlete respondents feel that engagement with an organization is the primary driver of this.

DEVELOPMENT OPERATIONS

Study participants praised W&M's Development office for its good work. The department's reporting and donor and prospect relationship management were commended for being top notch.

- *"Individual endowment reports that we are given are excellent. W&M Today emails have really interesting stuff sometimes."* – Focus Group Participant
- *"Personal relationship management is working well."* – Focus Group Participant

Study participants identified a few areas needing additional attention, including:

- Identification of specific funding needs;
- Personal asks;
- Donor follow up, including letters from students;
- Regular communication about impact of gift; and
- Sensitivity to life stages.

One focus group participant noted that W&M *"definitely did a good job making a connection and ask, but once my gift was done there was nothing."* Stewardship, and the knowledge around a gift's impact, was prioritized by the study participants.

Finally, several interview and focus group participants also noted best practices around stewardship that they would like to see. One woman noted that she *"asked a development person and they didn't seem to know how I could help. Maybe the College doesn't know what they need? I didn't get any feedback after that about how alumni can help."* As others mentioned, information around the College's needs and philanthropic opportunities are much appreciated.

²¹ See Figure 20 in Appendix D for the current and future engagement interests of alumnae versus female athletes.

CONCLUSIONS

This study’s findings demonstrate that women are eager for an inclusive, cross-campus approach to their engagement with William & Mary. W&M stakeholders see the need for this effort and believe the College will benefit from increased participation of women as philanthropists and leaders. However, study participants did not think this should be a separate or stand-alone program. Rather, they advocated for a gender-smart, comprehensive and integrated initiative across the College. As one focus group participant said: *“My husband and I equally share in the philanthropic decisions and singling out just women doesn’t suit a co-ed university.”*

As we consider how to structure the Women & Philanthropy Initiative, it is important to stay attuned to this feedback, along with the other themes that have surfaced again and again.

- Create more opportunities for alumnae to **personally connect** with **each other**, the College, and the **students**.
- Create opportunities for **substantive engagement** with the College, such as opportunities to be involved in brainstorming, decision making, and input on initiatives.
- Be sensitive to women’s **life cycle** and provide engagement and leadership opportunities that fit different life stages.
- **Communicate the needs** of the College and the impact of donors’ gifts.
- **Showcase** the professional and personal accomplishments of W&M women on and off campus.

	Compelling Reasons	Engagement	Leadership	Philanthropy	Development Operations
Personal Connection	X	X	X	X	X
Life Cycle		X	X	X	X
Connect with Students		X		X	X
Substantive Engagement		X	X	X	
Communication of Needs		X	X	X	X
Showcasing/Connecting Women	X	X	X	X	

This feedback suggests that the initiative will need to focus on and leverage the engagement, leadership and communication opportunities for women across W&M.

The recommendations outlined below provide a plan for how W&M can address these themes in a comprehensive approach. If acted upon, the recommendations have ramifications that extend beyond increased involvement and support from current W&M alumnae. This new model also will lead to a campus-wide culture shift that will allow W&M to engage other alumnae/i groups – such as minorities and young alumnae/i – more deeply and broadly.

RECOMMENDATIONS

To achieve deeper and more personalized interactions between alumnae and William & Mary, an increase in the number of alumnae volunteer leaders, and broader knowledge among alumnae about the College's resource needs, we recommend an integrated model for the Women & Philanthropy Initiative. This model addresses alumnae's desire for an inclusive initiative and promotes the cross-campus partnerships that the multi-pronged objectives require. The integrated approach will require visible and consistent commitment from W&M, but the resulting outcomes are substantial and far-reaching, transforming how W&M interfaces with all alumnae/i and broadening the development culture.

These recommendations only bolster an already strong, rigorous College of William & Mary. Through inclusive communications, deeper engagement, and increased leadership opportunities for underrepresented groups across campus, W&M will capture the minds, hearts, and purses of whole constituencies not fully engaged or represented before.

INTEGRATED MODEL

The model being proposed is specific to W&M and is shaped in response to the findings from the study, input from the Task Force and W&M's history, culture, infrastructure, and vision. As discussed in this report, alumnae already are strongly connected to W&M's mission and eager to support the College's continued academic excellence. However, many alumnae are not giving at capacity. Inclusive communication, increased leadership, and substantive engagement are central to unlocking this giving potential.

The goals of the initiative, as well as the objectives and strategies to attain success, are outlined below. A visual display of the model follows.

Goals: By 2018, W&M will:²²

1. Grow a robust pipeline for major gifts from women;
2. Deepen engagement of all donor types; and
3. Broaden and diversify W&M development culture.

Objectives: By 2018, increase the number of women who are:²³

1. Substantively engaged with W&M;
2. Volunteer leaders on campus; and
3. Showcased in W&M communication materials.

Strategies:

1. *Campus Commitment & Integration:* Ensure sustained leadership support with human and financial resources, significant training, and creation of metrics to track and fully integrate the initiative across W&M.

²² For each goal, University Development and other key constituents (i.e. Internal Advisory Committee, Alumni Association) will establish a baseline, determine the desired rate of growth, and develop appropriate metrics to track progress.

²³ For each objective, University Development and other key constituents (i.e. Internal Advisory Committee, Alumni Association) will establish a baseline, determine the desired rate of growth, and develop appropriate metrics to track progress.

2. *Inclusive Communication*: Audit and transform W&M's communication to be inclusive of women. Consistently showcase the leadership and success of W&M's women – students, faculty, staff, and alumnae.
3. *Substantive & Personalized Engagement*: Design significant and impactful ways through which women can engage with the College. Ensure that there are a range of opportunities for different life styles and stages.
4. *Alumnae Leadership*: Create a system to identify, recruit, and groom women for volunteer leadership roles at W&M.



An effective Women & Philanthropy Initiative needs to address all aspects of W&M's communication and work with women and, thus, must be diffused across programs campus-wide. While there is no doubt that connecting with women in ways that align with their preferences takes effort, women are more loyal over time if they are engaged and see the impact of all of the ways that they support an institution. This intentional focus on women's preferences will place W&M ahead of its peers as it creates one of the few university-based women's initiatives in the country that deliberately integrates alumnae throughout its culture.

IMPLEMENTATION PLAN: OBJECTIVES & STRATEGIES

There is a reason that only 40 universities have launched women and philanthropy programs: they represent a significant change for an institution's culture. Currently, the predominant fundraising model at most universities is based on male giving practices, emphasizing competition, recognition, and statistics/facts about impact. Women respond more to interactions that emphasize connection, collaboration, and engagement. As this report underscores, women will give – they simply approach their involvement and philanthropic decisions differently. Additionally, an organization's efforts to deepen its relationship with its female stakeholders must be specific to the history, culture, assets, and constituency of the organization.

It takes leadership, dedicated resources, and willingness to invest in the long-term to connect to women in the ways they have articulated and to institutionalize the program and practices. In order to ensure that the initiative is robust and sustainable, W&M leadership will need to invest in staff resources and training, transform its communication, and create and expand engagement and leadership opportunities. The initiative will need to span W&M so that it can leverage resources across the College and impact the alumnae community broadly and deeply.

W&M's Women & Philanthropy Initiative is uniquely designed to address all these points. The following objectives and strategies provide a road map that will help W&M transform its language and communications, as well as increase its engagement and leadership opportunities to grow alumnae's relationship with and commitment to the College. The result will be the broadening and diversification of W&M's fundraising culture.

1. CAMPUS COMMITMENT & INTEGRATION

Implementing the recommendations contained in this report will require a commitment from W&M administration to provide the resources and infrastructure for launching and sustaining a comprehensive and integrated initiative.

A key lesson learned across the other institutional models is the importance of long-term vision, sustained leadership, institutional commitment, dedicated resources, and detailed benchmarking and tracking of progress. Too often women's programs are relegated to one department and led by a manager without influence, leadership, and strong advocacy for outcomes.

Programs that thrive have been able to:

1. Design a strong link between external volunteer champions and internal staff and faculty leadership;
2. Demonstrate patience and pay attention to the long-term value gained from increasing the number of women involved, rather than just short-term results;
3. Evaluate results and adapt activities across time; and
4. Influence programming choices and conversations across campus to align with women.

These programs are powerful accelerants for a university's philanthropy.

No university program has been sustained without the full and ongoing commitment of university leadership with financial and staff support. Such demonstrated commitment from the top allows the program to continue and succeed across changes in staffing or adaptation of objectives.

Objective: Provide the resources, tools, and training needed to successfully implement the initiative and ensure it is integrated across the College. Broaden W&M's development practices to be more inclusive of the motivations of all alumnae/i donors, integrating findings from this report.

SUGGESTED IMPLEMENTATION

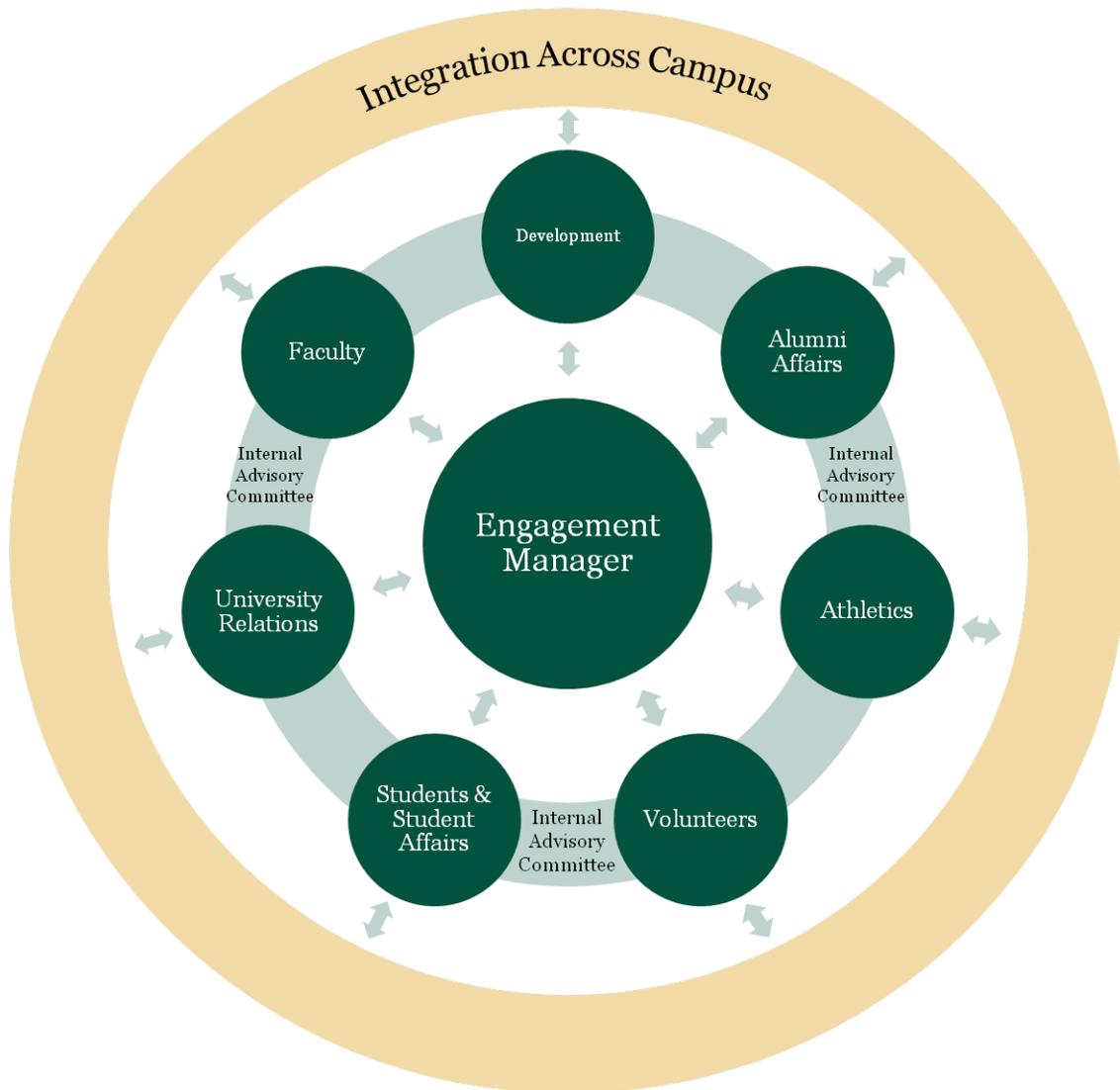
- 1.1 In the first 120 days, deepen campus understanding and commitment to action with the following suggestions:
 - Gain input and buy-in from President Reveley and senior leadership team.
 - Share final report with Development Office and Alumni Affairs Office.
 - Share final report with other key stakeholder groups, such as the 100th Anniversary Committee and the Foundation Board of Trustees.
 - Seek additional champions for this work, particularly among the Board of Visitors, Foundation Board, and other College leaders.
 - Set baselines and growth targets for the goals and objectives identified on p.17.

- 1.2 Hire a new Engagement Manager²⁴ (working title) to drive and track the implementation of the Women & Philanthropy Initiative across the College. The Engagement Manager will:
 - Be responsible for driving and tracking the implementation of the initiative and overseeing the day-to-day operations. The person is responsible for interfacing across the Office of University Development, the Alumni Association, the Internal Advisory Committee, 100th Anniversary Committee, and other individuals and groups across the College as needed.
 - Report to the Director of Volunteer Management and, together, they would be responsible for holding W&M staff accountable for integration of the initiative.
 - Have strong development experience and be able to interact with senior leadership at W&M as well as cultivate high net worth donors. He/she will not be a frontline fundraiser.
 - Coordinate and support the Internal Advisory Committee described in 1.3.

- 1.3 Assemble an Internal Advisory Committee (working title) consisting of key W&M faculty, staff, and volunteers – both men and women – to assist with and guide implementation of the report and plan's recommendations. The Committee will:
 - Review and then be ambassadors for the report and recommendations.
 - Lead the implementation and integration of the Women & Philanthropy Initiative across campus. See visual below.
 - Be made up of faculty, staff, and volunteers across W&M campus who understand the need, purpose, and goal of the initiative and who have the ability to affect change at all levels of the College.

²⁴ Though the initial focus of this effort is women, the long-term goal is broader engagement of all constituency groups. Thus, the title of the person spearheading this effort is "Engagement Manager" not "Women & Philanthropy Manager." The initiative is not focusing exclusively on women. It is simply starting with them.

- Bring forward ideas, events, and activities for engaging with and communicating to women.
- Disseminate information about and lead the effort on implementing the initiative in their departments and schools.
- Be structured as a partnership and not be viewed as an obstacle nor compete with other fundraising efforts.



- 1.4 Align with the work of the 100th Anniversary Committee.
- The 100th Anniversary is the first, high profile opportunity to showcase W&M's commitment to women and highlight its work to expand women's engagement and leadership with the College.
 - To this end, the Engagement Manager will collaborate with the 100th Anniversary Committee to determine how best to:
 - Exhibit W&M's efforts and celebrate W&M women from the past, present, and future; and
 - Showcase the metrics achieved in the first few years of the Women & Philanthropy Initiative.

- 1.5 Assess W&M's fundraising practices to ensure that they are inclusive of the motivations of all alumnae donors.
 - Determine person(s) best suited to conduct assessment (e.g. Engagement Manager, Internal Advisory Committee, outside counsel).
 - Evaluate current fundraising practices and design adaptations to support women's giving patterns.
 - Increase the number of women prospects assigned to Development staff.
 - Design methods and conversations to help women with financial literacy and their ability to make a big gift while retaining enough resources for their future and family.
 - Tie the outcomes and impact to the campaign priorities in terms relevant to women, based on the key motivators for philanthropic decisions indicated in the research.

- 1.6 Provide training to key faculty, staff, and volunteers so they engage with alumnae more effectively.
 - Provide extensive and ongoing training to Development staff, Alumni Association staff, the Internal Advisory Committee, 100th Anniversary Committee, Campaign Cabinet, Foundation Trustees, key fundraising volunteers, and others, on:
 - National research on women's giving and women's engagement, leadership, and philanthropy at W&M;
 - Inclusive communication and language for effective fundraising;
 - Identification of male-centric fundraising practices and ways to adjust them to be more gender smart;
 - Donor-centric engagement and moving beyond "just asking;"
 - Personalizing the engagement and solicitation of alumnae; and
 - Communicating impact in compelling stories of volunteerism and gifts.
 - Determine person(s) best suited to conduct training (e.g. Engagement Manager, Internal Advisory Committee members, outside counsel).
 - Incorporate training into on-boarding process of new hires.
 - Incorporate behavioral change into performance objectives for staff.
 - Build cross-department strategy sessions to plan and identify best practices for donor cultivation of women.

- 1.7 Create metrics to develop baseline measures from which W&M can effectively measure behavioral and cultural change.
 - Conduct further data analysis on specific W&M constituencies, such as female athletes and underrepresented groups, to determine baseline metrics, giving patterns and motivations, and ways that they are being solicited.
 - Engagement Manager will spearhead development and implementation of metrics, with input from others.

SUGGESTED METRICS

Metrics are needed to track behavioral and cultural change. Examples to measure progress and accountability may include but are not limited to:

- Number of internal and external individuals championing the Women & Philanthropy Initiative.
- The number of meetings of the Internal Advisory Committee; number of action items completed by Internal Advisory Committee members.
- Number of fundraising officers and volunteers who have received training.
- Number of enhanced or new programs/events as a result of this study.
- Number of staff members who understand and use best practices based on annual performance reviews.
- Increased number of visits to alumnae and/or couples.

2. INCLUSIVE COMMUNICATIONS

In order to achieve successful, integrated, and sustained cultural change through the Women & Philanthropy Initiative, it is vital for W&M to review and transform their internal and external communications as they relate to women. These recommendations will attune the College's messaging to the female half of its population. Changing the way W&M communicates with women is the first step to creating meaningful communication for all underrepresented groups.

Objective: Transform William & Mary's current communications to be more representative of, and oriented to, women and underrepresented groups.

SUGGESTED IMPLEMENTATION

- 2.1 Conduct communications audit, looking at all the ways William & Mary communicates about and to women and underrepresented groups.
 - Establish internal process to review key alumnae/i communications with Internal Advisory Committee to ensure:
 - Women and underrepresented groups are equally represented in print, web, and video content;
 - Women and underrepresented groups are included in solicitation and appeal letters, both within the content and listed as a donor; and
 - Gender selection options are included in W&M's data collection infrastructure.
 - Develop a process for annual review of external communications that involves the Engagement Manager and representatives from underrepresented groups.
 - Conduct communications audit on an ongoing basis.
- 2.2 Consistently include alumnae equally across W&M's communications.
 - Recommend enhancements for communications and messaging to resonate with women. An example is assessing whether the number of times women are mentioned in College publications reflects the percentage of women students on campus.
 - Work with appropriate cross-campus allies to increase women's participation in high-profile roles such as:
 - Commencement Speaker – 24% have been women since 1980;
 - Honorary Degree Recipients – 18% have been women since 1980; and
 - Alumni Association Medallion Recipients – 19% have been women since 1934.
- 2.3 Highlight successful W&M alumnae to the wider campus community.
 - Draw attention to W&M's prominent alumnae and volunteer leaders. Create a way to have alumnae leaders' and donors' stories told.
 - Duke University's Women in Leadership & Philanthropy Initiative focused on an integrated approach and used its campaign website to feature women's stories.

- Ensure prominent alumnae are featured in student communications so that members of the College community are exposed to prominent female leaders and philanthropists.
- 2.4 Train Development staff, Alumni Association staff, the Internal Advisory Committee, 100th Anniversary Committee, Campaign Cabinet, Foundation Trustees, and key fundraising volunteers specifically around inclusive language and communications oriented to women. (See 1.6 for detail.)
- 2.5 Showcase the impact of giving.
- Collect and tell stories of W&M's impact on its students and community.
 - Develop a stewardship process and materials that specifically focus on stories and impact. Study participants were especially excited about connecting with the College and its mission once their gifts had been given (e.g. letter from a student once he or she received a scholarship).

SUGGESTED METRICS

Metrics are needed to track behavioral and cultural change. Examples to measure progress and accountability may include but are not limited to:

- Number of women nominated for Alumni Association Medallions or other alumnae/i awards; number of honorary degrees given to women; and number of women featured as the Commencement Speaker.
- Number of women to appear in alumnae/i communications (e.g. alumnae/i newsletters, magazine, etc.), as well as the prominence of the story.
- Establish baselines for current stewardship efforts using student involvement and track increase in these efforts over time.
- Progress and improvements against initial audit results, tracked by additional audits to ensure changes are being made.

3. SUBSTANTIVE & PERSONALIZED ENGAGEMENT

While W&M has alumnae programming, much of it through the work of The William & Mary Alumni Association, this study's findings indicate a desire from alumnae for programming that allows deeper, more personalized connection to the College's mission.

The suggested programming, focused around personalized and tailored engagement, will help W&M leverage opportunities for women to more deeply and directly connect with the College, as well as promote the visibility of the W&M's commitment to women. Engagement activities for women that provide opportunities for lifelong learning, behind-the-scenes understanding of programs and impact, intellectual exchange, and networking and leadership opportunities will provide W&M with access to untapped interest, commitment, and resources.

Objective: Capitalize on the desire and opportunity that exists among women stakeholders to connect with W&M. Build substantive and personalized engagement opportunities that motivate leadership and philanthropy.

SUGGESTED IMPLEMENTATION

- 3.1 Create substantive engagement opportunities.
 - Collaborate with campus partners to enhance current programming and events to showcase W&M's strengths to women, as well as provide them with an opportunity to network and continue learning in their own lives.
 - Consider creating women-specific forums on topics of interest, such as financial decision making, child development, leadership, entrepreneurship, and other areas suited to the lifestyle and life cycle of constituents.
 - Evaluate opportunities to leverage and enhance existing campus activities at W&M to expand opportunities for women to gather and engage in conversations and interactive experiences on current issues.
- 3.2 Continue to build out regional programming and presence to build pipeline.
 - Enhance regional programming with incorporation of women-specific forums on topics of interest, such as financial decision-making, leadership, entrepreneurship, and other areas suited to the lifestyle and life cycle of constituents. A first step to engage women can be to ask their input regarding topics to provide.
- 3.3 Connect alumnae with students and mentorship opportunities.
 - Consider ways to incorporate student interaction into current alumnae events and campus visit opportunities, with the ultimate goal of bringing women closer to W&M's mission and seeing the impact of their work on current students.
 - Explore potential partnerships to increase mentoring and networking opportunities for women and current students. This mentoring programming need not be formal. The President's Council of Cornell Women connects with students at its semi-annual meetings to provide guidance and help students network. Informal mentoring often occurs when a Council member and student decide to stay in touch.

- Enhance the current public service projects by finding ways to connect students to alumnae. Also show impact of these projects. For example, a small women's program in Washington, D.C. made this type of enhancement by asking beneficiaries to write follow-up letters, sharing the impact of the volunteer project on their work or lives.
- 3.4 Connect alumnae with W&M faculty and leadership.
- Communicate with faculty to create academically-focused activities and collaborative opportunities. Interview participants noted that this type of participation in the College's educational programming is well targeted to their interests and talents.
 - Explore opportunities for constituents to speak with female leaders at W&M (deans and executive administrators) about their roles at the College, as well as how attendees can increase their involvement with the school.
- 3.5 Create meaningful opportunities with sensitivity to a woman's stage of life.
- Create opportunities for alumnae to participate in short-term commitments that may appeal to women who, because of career or family obligations, cannot commit to Board leadership at this time, but who are interested in and capable of volunteering with the College. Such activities can include:
 - Task Forces or councils tasked with solving a specific problem relating to the College;
 - Short-term volunteer positions, such as planning an alumnae/i event; and
 - Round-table discussions to speak to students.
- 3.6 Provide deeper knowledge of W&M's opportunities and vision.
- Communicate the College's philanthropic opportunities, which are often discussed with major donors, to the wider prospect pool of W&M donors.
 - Develop a menu of high-value, high-impact projects to be shared with principal and major-gift prospects. This will help connect women more deeply with the College's mission as they consider their gifts to W&M.

SUGGESTED METRICS

Metrics are needed to track behavioral and cultural change. Examples to measure progress and accountability may include but are not limited to:

- Establish baselines for current engagement levels and track over time the alumnae and women friends' participation rate; and
- Establish baselines and track over time, via surveys, alumnae, and female friends' perceptions of engagement with W&M, including the value of engagement and the promotion of opportunities to connect.

4. ALUMNAE LEADERSHIP

In order to show W&M's commitment to women – both at the 100th Anniversary of women on campus and beyond – it is imperative that the College focus efforts to increase the number of women volunteer leaders and women's input in leadership selection.

The Engagement Manager and Internal Advisory Group's suggested work around leadership will serve as a galvanizing force to help W&M intentionally promote awareness of and generate support for qualified women leaders. These recommendations will also clear pathways for women to ascend into these positions. Ultimately, empowered alumnae in top positions will serve as culture-changers for the campus-wide community as leadership and philanthropic role models.

Objective: Increase number of alumnae volunteer leaders at W&M, both on the College's Foundation and Alumni Association, and in other leadership roles across campus.

SUGGESTED IMPLEMENTATION

- 4.1 Collaborate with W&M leadership, The Board of Visitors, members of the College of William & Mary Foundation, Alumni Association, and other key stakeholders to enhance W&M's commitment to increase women's participation in volunteer leadership roles.
 - The Engagement Manager, along with the campus-wide Internal Advisory Council, should work to promote gender awareness across campus regarding nomination criteria, role on boards, and the unique benefits of including women in decision making.

- 4.2 Create a process for current volunteer women leaders to identify and ask (or "tap") women to step into more significant leadership roles and their corresponding philanthropic roles. "Tapping" is the act of either men or women noticing the potential of an alumna and helping her to become engaged in new ways. A tapping network will formalize sharing, in a one-to-one setting, personal stories of stepping into leadership and philanthropy, helping others to see the link.
 - Duke University's Women in Leadership & Philanthropy initiative is creating such a program for its development staff and volunteers to connect to and encourage women to consider leadership roles.
 - Corporations have models of "sponsoring" women which could be adapted for W&M. Examples include the ongoing programs at Credit Suisse, Deutsche Bank, and Citigroup, which are examples of formal programs of "tapping."²⁵
 - Because of the strong connection alumnae feel to their student affinity groups (i.e. varsity sports teams, Greek organizations), W&M should work with those groups to identify leaders and make personal asks.

²⁵ Further resources available via the Harvard Business Review, "The Sponsor Effect: Breaking Through the Last Glass Ceiling," 2011.

- 4.3 Develop an internal process to facilitate proactive and consistent nominations of women for all W&M leadership boards, advisory councils, Campaign leadership positions, and key administrative and honorary positions. The Director of Volunteer Management, with support from the Engagement Manager, would oversee this process.

HARVARD BUSINESS REVIEW ON DEVELOPING A PIPELINE OF WOMEN LEADERS

“Becoming a leader involves much more than being put in a leadership role, acquiring new skills, and adapting one’s style to the requirements of that role. It involves a fundamental identity shift. Organizations inadvertently undermine this process when they advise women to proactively seek leadership roles without also addressing policies and practices that communicate a mismatch between how women are seen and the qualities and experiences people tend to associate with leaders.

It’s not enough to identify and instill the ‘right’ skill and competencies as if in a social vacuum. The context must support a women’s motivation to lead and also increase the likelihood that others will recognize and encourage her efforts—even when she doesn’t look or behave like the current generation of senior executives.

The solutions to the pipeline problem are very different from what companies currently employ. Traditional high-potential, mentoring, and leadership education programs are necessary but not sufficient.”

(Harvard Business Review, “Women Rising: The Unseen Barriers,” 2013)

SUGGESTED METRICS

Metrics are needed to track behavioral and cultural change. Examples to measure progress and accountability may include but are not limited to:

- Number of women nominated for or added to the pipeline for the William & Mary Board of Visitors, College Foundation Board, School/College Advisory Boards, Campaign Committee, and/or the Alumni Association Board.
- Number of women moved into other volunteer leadership pipelines.
- Track progress of the number of women administrative leaders, faculty members, and academic leadership.

SUMMARY

With 40 models of women and philanthropy programs across the United States, it is easy to believe that there would be at least one to replicate for W&M. Yet every program is different based on its institution's character, traditions, and desired goals. To that end, this report provides a recommendation for a model that is unique to W&M. The recommendations, however, are grounded in best practices gleaned from the many models:

- Base the initiative in research;
- Identify and cultivate leadership;
- Be inclusive;
- Create ongoing leadership opportunities;
- Focus on women's giving, not women's causes;
- Create opportunities for women to connect with each other; and
- Invest resources in this work for long-term success.

The implementation of these recommendations will certainly require investment from W&M. If it takes more effort to engage women, why do it? The philanthropic landscape has changed. Women are earning more and giving more. Without adapting to these changes, W&M is leaving money on the table and will not build the pipeline for the future given the current predominance of female students.

A Women & Philanthropy Initiative will open the door for new donations. There is a pent-up energy and a corresponding increase in support when women see that they are met and engaged as they prefer. National Geographic, which has not even launched its program yet, received a spontaneous \$50,000 gift simply due to the commitment to study the effort. The University of San Francisco just received a \$100,000 gift to help underwrite the program it is now launching. The Women's Philanthropy at Indiana University program raised an additional \$1 million in new donations from women by its second year (2012). Princeton University saw an increase in women's giving (double the number of \$1 million+ gifts from women in FY 2008-2012, compared to FY 1998-2002). Per the earlier example of the University of Wisconsin-Madison, over \$75 million has been given by women since 1988.

Revenue is just one of the benefits of a successful Women & Philanthropy Initiative. Women bring their whole selves to institutions they care about. W&M's "return on investment" will also include bringing forth the talents, loyalty, and voice of women. They will enhance campus decision-making, innovation, and the strength of W&M's entire community.

APPENDIX

APPENDIX A: RATIONALE FOR WOMEN & PHILANTHROPY AT WILLIAM & MARY

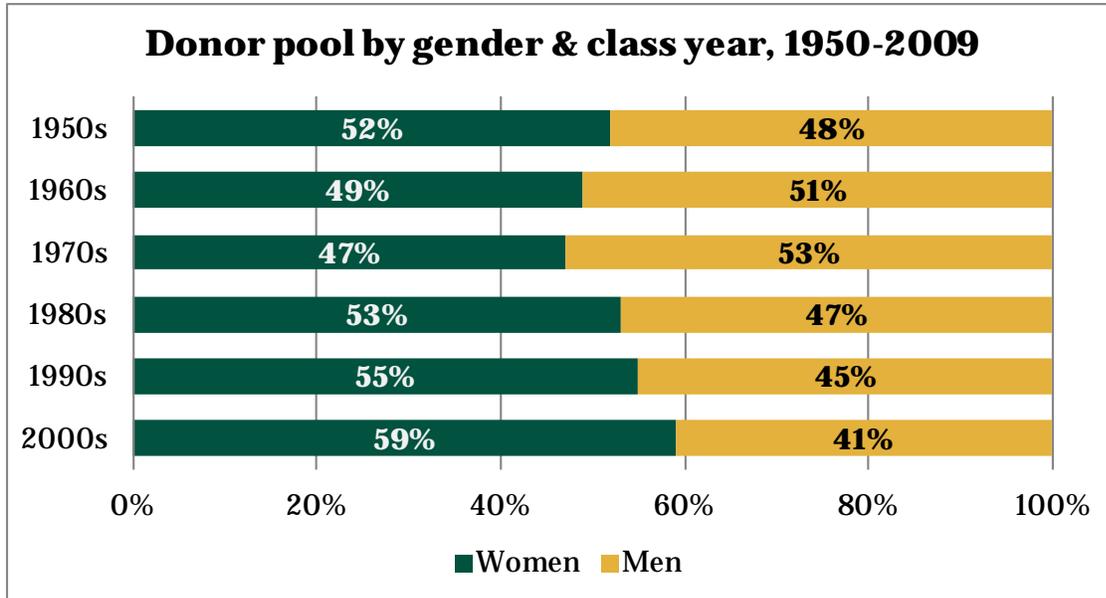


Figure 1

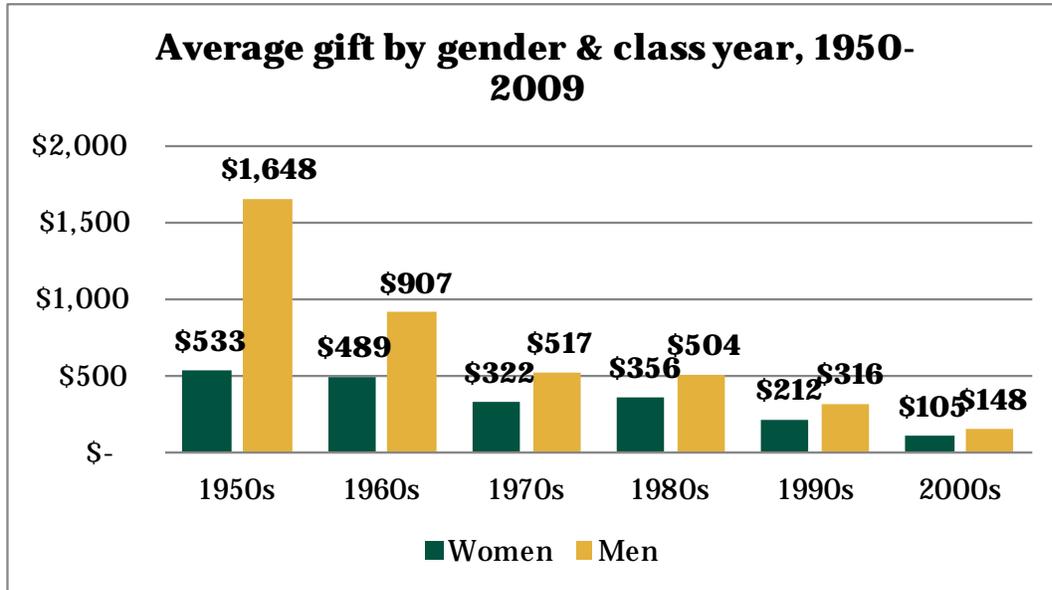


Figure 2

APPENDIX B: METHODOLOGY

Members of the Task Force on Women & Philanthropy

- Virginia Miller Ambler '88, Ph.D. '06
- Sue Hanna Gerdelman '76
- BG Robert A. Glacel (USA, Ret.), PA '98, '02
- Elizabeth Cabell Jennings '85
- Dr. Ellen Renee Stofan '83
- Martha Frechette Tack '78
- Anne Brooke Tribble Weinmann '79

Interview Participants

- Dawn Arnall
- Beth Comstock
- Lynn Dillon
- Sally Gore
- Jane Kaplan
- Gale Kohlhagen
- Leanne Kurland
- Suzann Matthews
- Kathryn McQuade
- Judy Nance
- Gwen Norton
- Jane Powell
- Sybil Shainwald
- Joyce Shields
- Theresa Thompson
- Susan Trice

Focus Group Participants

- Linda Beerbower Burke '70
- Alice T. Davison 'Parent
- Mary Sue Estes Donahue, '79
- Frances Carla Engoron '70
- Maryellen Farmer Feeley '85
- Nancy Burges Gofus '75
- Susan A. Jensen 'Parent
- Jill Marie Lord '94
- Susan Aheron Magill '72
- Sharon Hall McBay '63
- Maria Elena Monteverde-Jackson '93
- Sharon Kay Philpott '85
- Leigh Anne Pence '00
- Jacqueline Ganster Thamm '75
- Jennifer Volgenau Wiley '90

Study Question Matrix

	Survey	Interviews	Focus Group
Background Questions			
Year graduate	x		
Type of degree	x		
School went to	x		
Groups involved in	x	x	x
Experience at W&M			
Experience as a student	x	x	x
Experience as an alumna	x	x	
Change in perception of school	x	x	x
Engagement with W&M			
Current engagement with W&M	x	x	x
Ease of engagement with school	x	x	
Engagement activities like to see more of	x	x	
Leadership Questions			
Development of leadership skills; influence of W&M	x	x	x
Philanthropy Questions			
How philanthropic decisions are made; difference between men & women	x	x	x
Types of organizations support	x	x	x
What factors influence philanthropic decisions	x	x	x
How describe self as a donor to W&M	x	x	
Motivation for supporting W&M	x	x	
If not supporting W&M, why	x	x	
WIP Program			
Response/reaction to concept paper (ideas & messaging)	x	x	x
Is this the right focus for the school now?	x	x	x
How will others respond	x		
Would W&M benefit if women more engaged? How/why?	x	x	
What is the best way to engage women in school? Leadership? Philanthropy?	x	x	x
Demographic Questions			
City, state where live	x		
Marital/family status	x		
Race/ethnicity	x		
HH income	x		
Level of education	x		

APPENDIX C: SURVEY DEMOGRAPHICS

The W&M survey elicited responses from a wide cross-section of alumnae of W&M from the classes of 2013 and earlier. Administered to 4,581 participants and available October 21- November 4, 2013, a total of 525 women completed surveys (11.5% response rate).

While the majority of respondents were W&M alumnae, their ages, income levels and experiences during and after school attendance varied widely. The total number of responses and the diversity of participants' experiences provided for a meaningful report. The following charts provide more in-depth information about the characteristics of survey respondents.

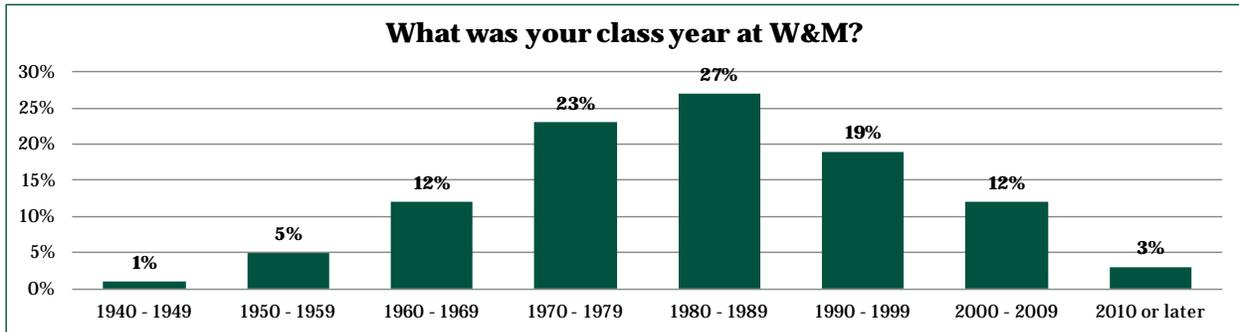


Figure 3

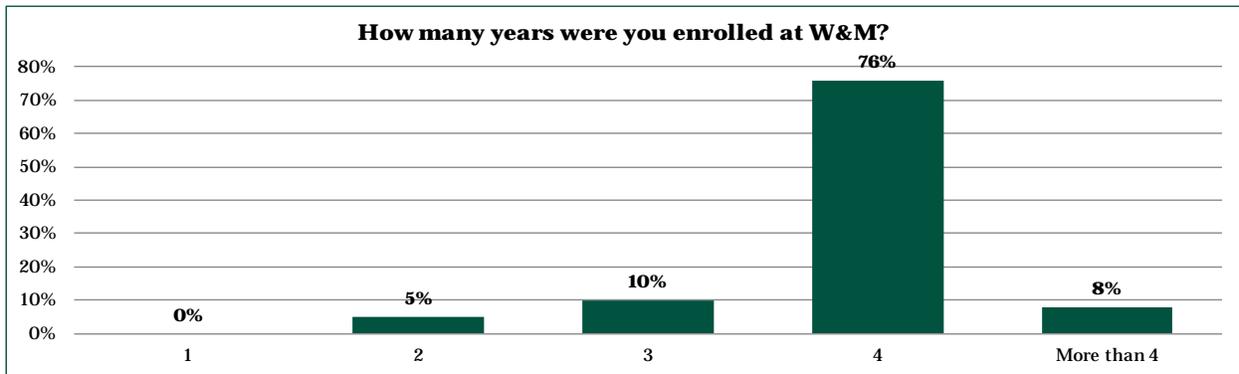


Figure 4

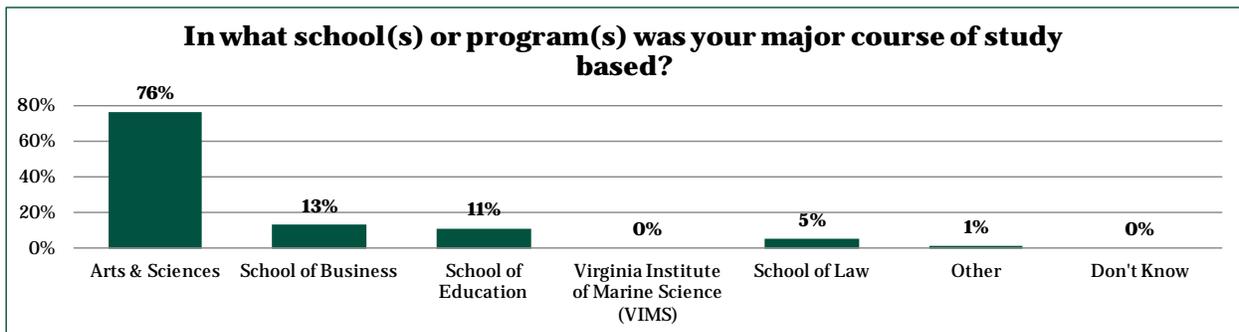


Figure 5

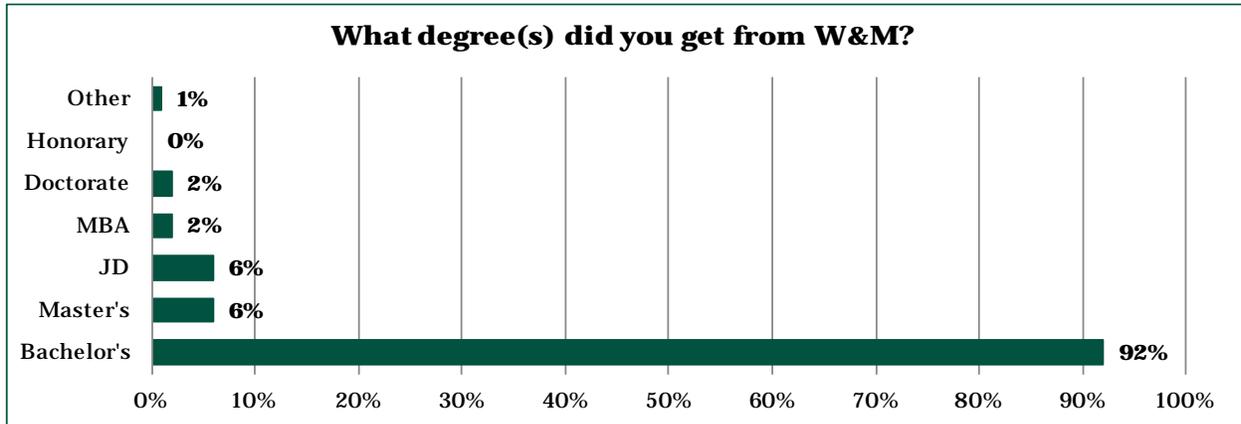


Figure 6

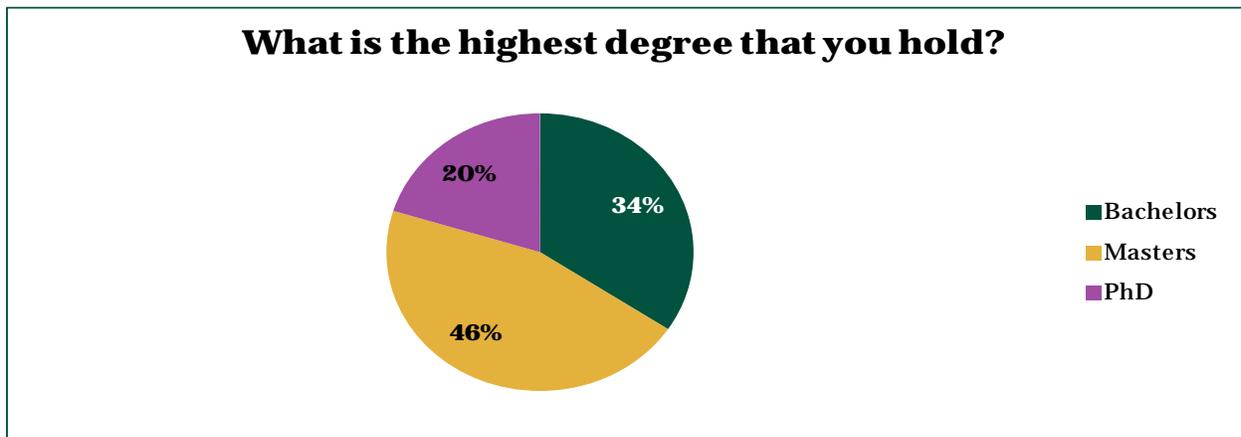


Figure 7

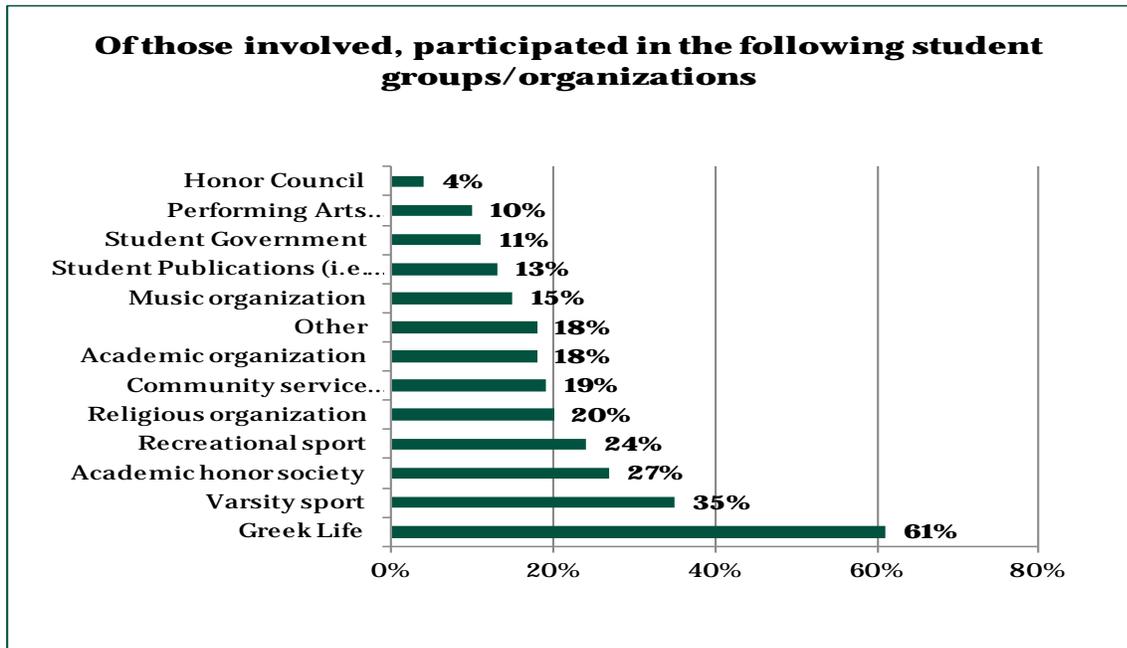


Figure 8

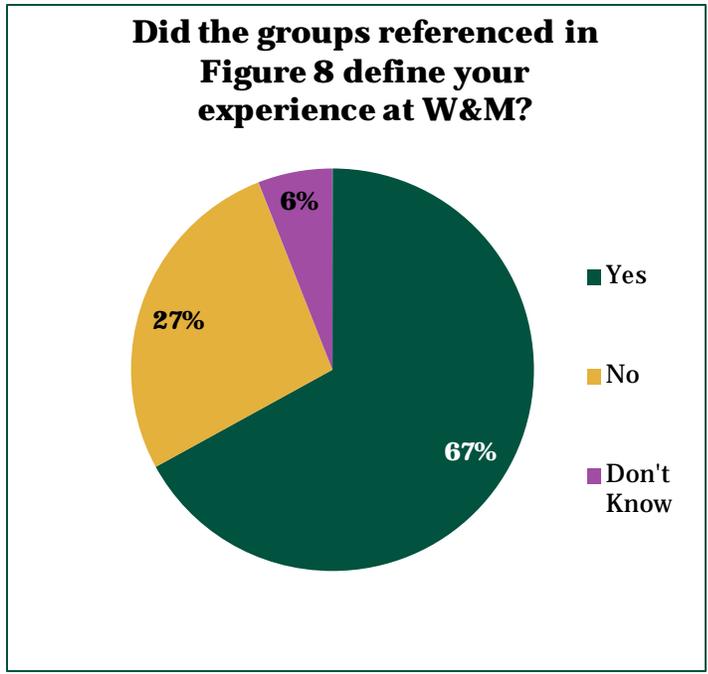


Figure 9

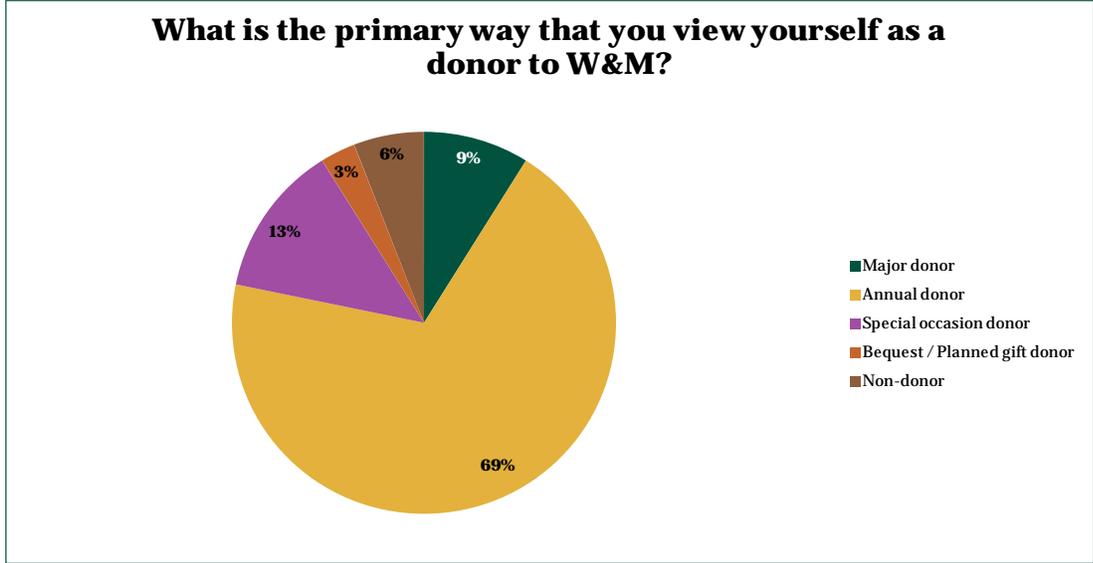


Figure 10

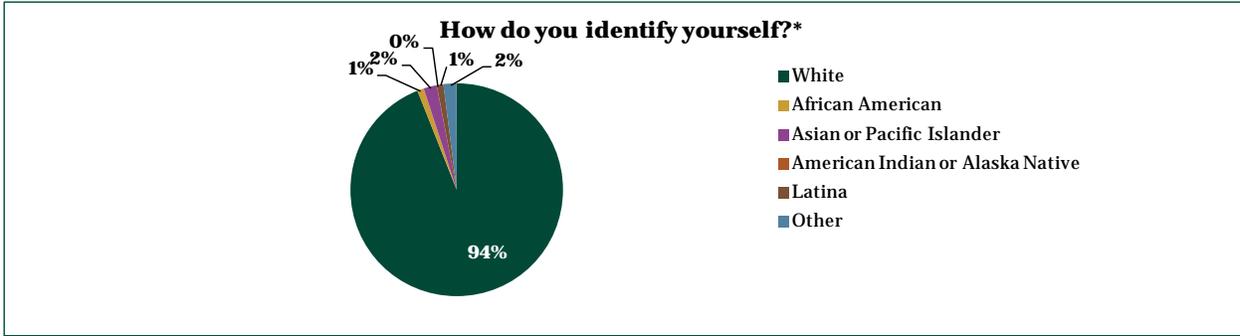


Figure 11

*Due to the small sample size of non-white respondents (33 total), we cannot draw any conclusions based on race. However, comparison of responses reveals that non-white participants' responses are similar to the general population as reported here.

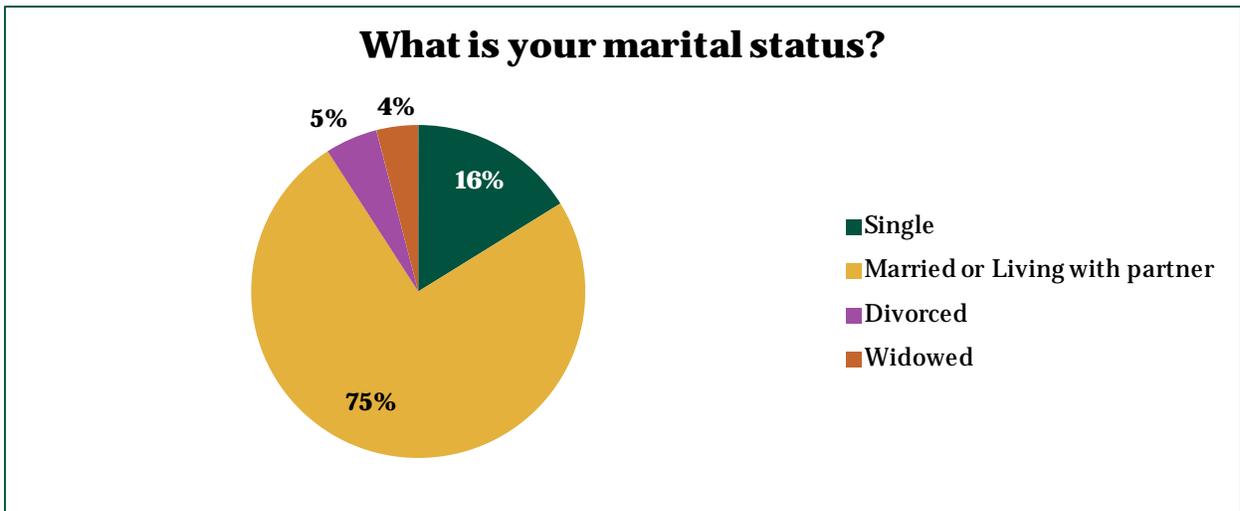


Figure 12

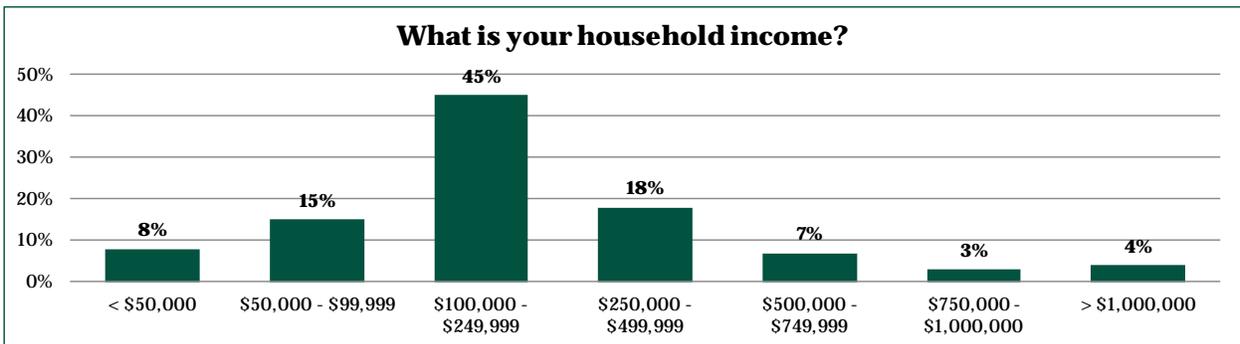


Figure 13

**APPENDIX D:
SURVEY FINDINGS**

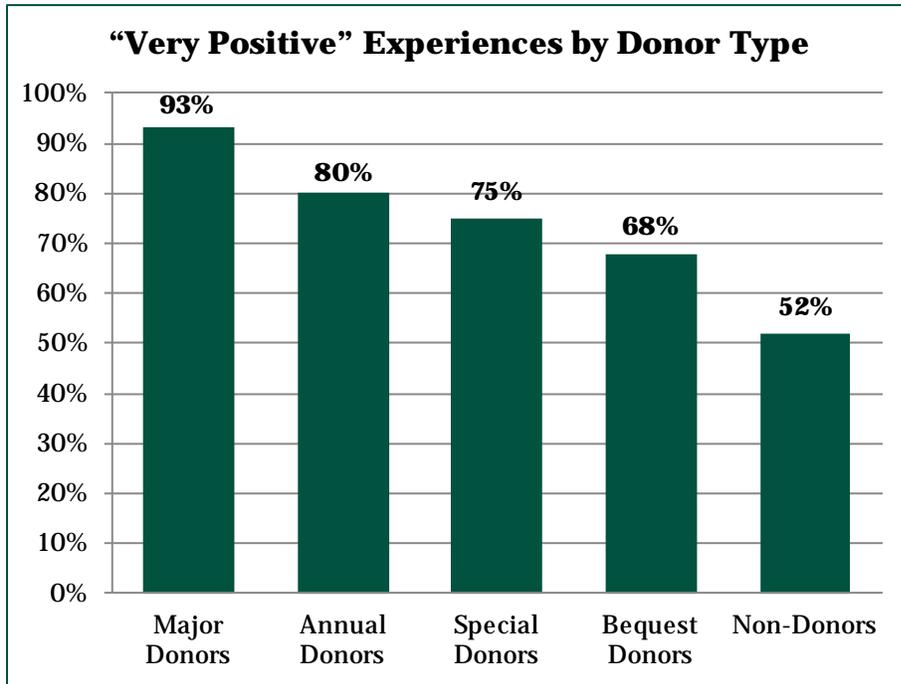


Figure 14

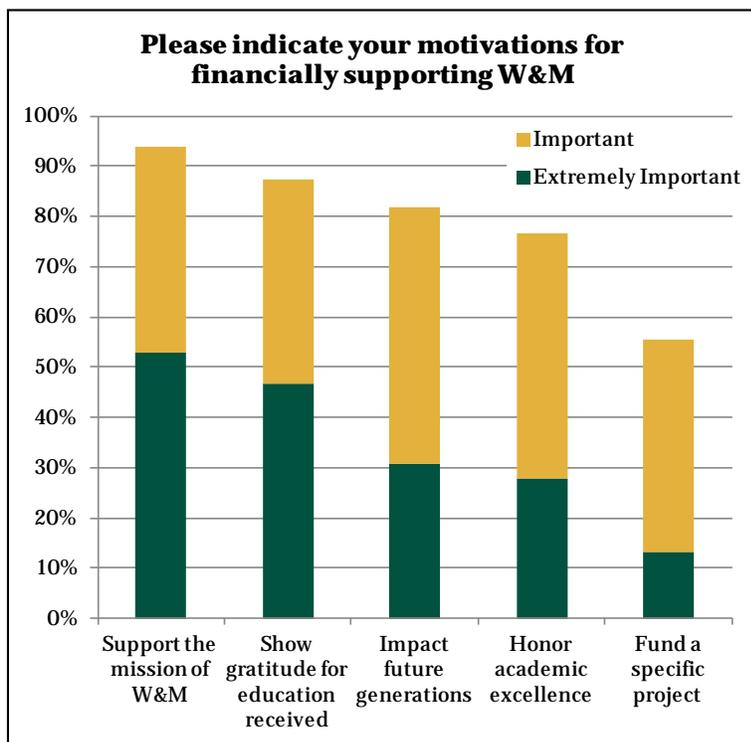


Figure 15

Primary Connections to College	Self-Rating of Donor Type					Total
	Major	Annual	Special	Bequest	Non	
Give to W&M	93%	86%	41%	93%	3%	76%
Interact socially with W&M alumni online	56%	63%	73%	47%	62%	63%
Interact socially with W&M alumni in person	73%	57%	44%	67%	48%	57%
Follow W&M news	58%	56%	52%	73%	48%	55%
Visit campus to attend Homecoming or Reunions	55%	34%	25%	43%	17%	34%
Follow W&M athletics	36%	32%	30%	13%	28%	31%
Visit campus to attend W&M events	44%	24%	18%	43%	10%	25%
Volunteer for W&M	49%	20%	5%	27%	0%	20%
Attend off-campus W&M sponsored events	29%	20%	6%	33%	10%	19%
Interact professionally with W&M alumni	20%	19%	16%	13%	14%	18%
Interact with current W&M students	30%	12%	8%	0%	10%	13%
Interact with W&M athletic coaches	20%	10%	18%	0%	10%	12%
Interact with current W&M faculty	20%	8%	15%	27%	10%	11%
Use W&M connections to forward professional goals	4%	7%	8%	0%	3%	7%
Speak to classes or student groups on campus	5%	3%	0%	0%	3%	3%
Number of Respondents	45	353	63	15	29	505
Median Number of Connections	6	4	3	5	2	

Figure 16

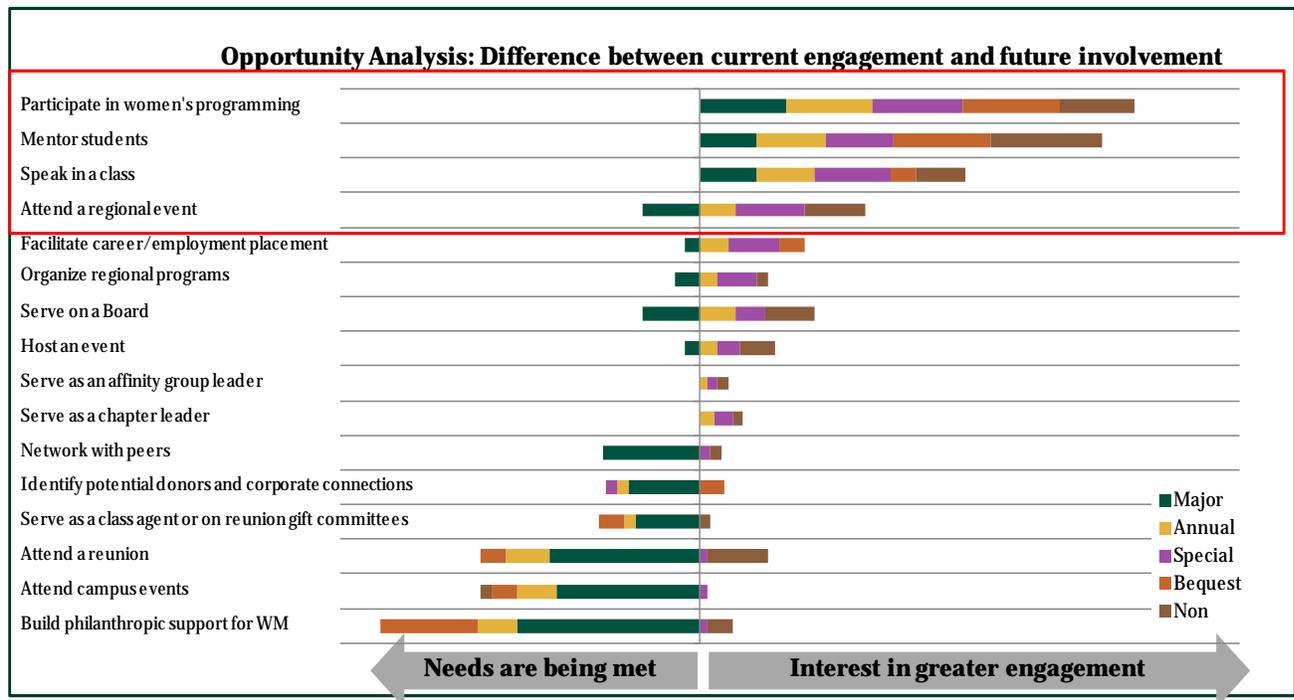


Figure 17

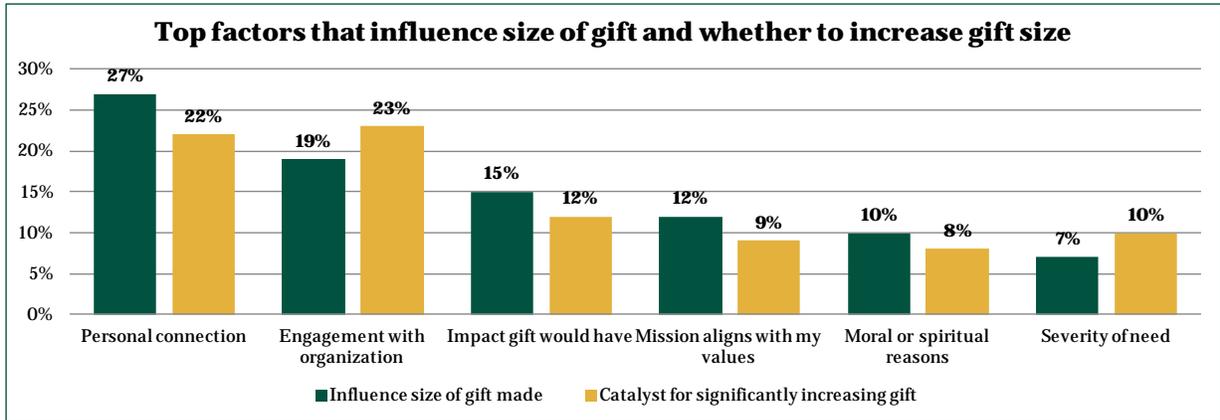


Figure 18

Motivator Predictive Model for Donor Type*			
Motivation to Donate	Major	Annual	Special
Support the mission of the College of WM		1	1
Access to College events and people	3		
Compete with other donors	4		
Fund a specific project	1	2	
Honor athletic excellence		5	
Leave a family legacy	2	4	
Model philanthropy for my children		3	2
Respond to an urgent request for help	5		

*Note: the number in each Donor Type column indicate in order from 1 to 5 (or for Special from 1 to 2) the motivators that matter most to each donor type. Bequest and Non-donor types have too few respondents to accurately predict.

Figure 19

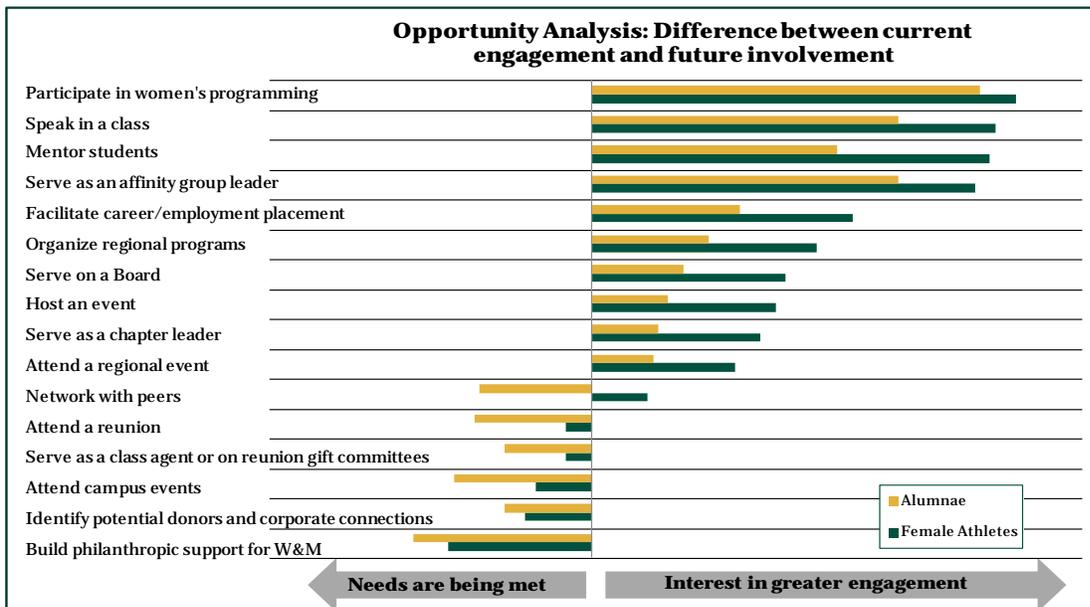


Figure 20

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APPENDIX F: ABOUT ORR ASSOCIATES, INC. (OAI)

Orr Associates, Inc. (OAI) is a national leader in fundraising and development consulting, focusing on development strategy, planning and implementation. Drawing on more than 20 years of experience working exclusively with nonprofit organizations in the United States and abroad, OAI and its 50 team members have helped more than 400 clients raise hundreds of millions of dollars for their causes.

Kathleen Loehr, Managing Director, has a particular expertise in Women and Philanthropy spanning the past 17 years. Since 2008, Kathleen has been a member on the Advisory Board for the Women's Philanthropy Institute at the Center on Philanthropy. Her expertise on women and philanthropy work began in 1996 as Director of the President's Council of Cornell Women (PCCW) for two years. PCCW has been instrumental in growing the number of women leaders for Cornell as well as increased giving. In 2005, Kathleen helped launch the Tiffany Circle at the American Red Cross, its first ever women-focused giving program. The first year goal of \$1 million was surpassed three-fold, and this initiative now brings in over \$11 million annually.