

Your Role in Promoting AAUW's Mission The AAUW FUND

for

AAUW Florida Development Officers

December 7, 2021 - Zoom Meeting - 7:00 p.m.

Presented by

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35-year non-profit fundraising professional

AAUW Fund Enthusiast!

Past Chair/Co-Chair, AAUW National Fundraising Committee (2009-2015)

Your Role in Promoting AAUW's Mission - The AAUW FUND

- ❖ **The Wonderful World of Fundraising!**
- ❖ **Educate members on how AAUW Fund advances our mission**
- ❖ **Promote giving to AAUW from the state, branches & individuals**
- ❖ **Appreciate and thank donors appropriately**
- ❖ **Maintain accurate records and interface with national office**
- ❖ **Q & A Time**

The Role of Philanthropy

**You make a living by what you get.
You make a life by what you give.**

Sir Winston Churchill

**To keep a lamp burning, we have
to keep putting oil in it.**

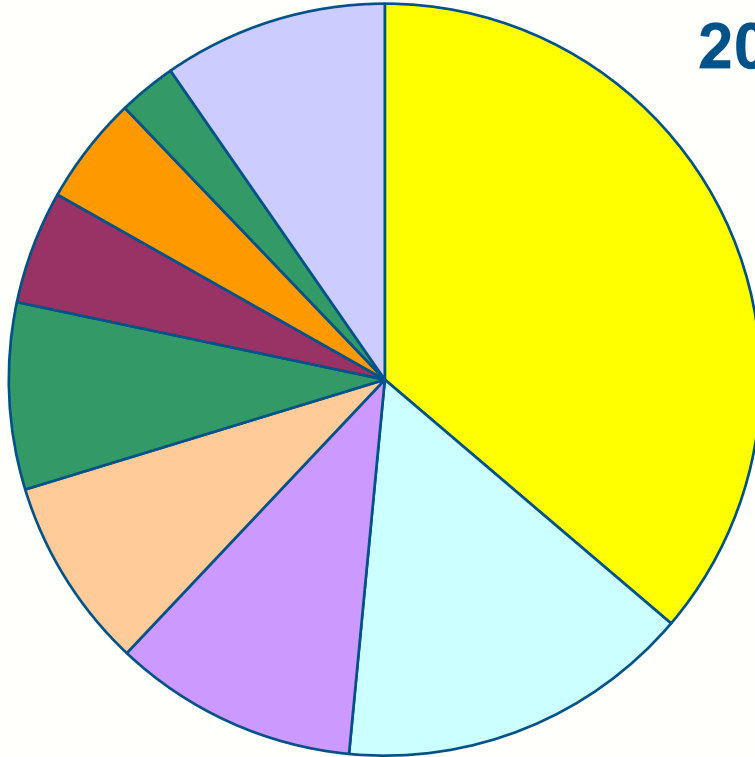
Mother Teresa

The Wonderful World of Fundraising!

- ***The BIG picture of Fundraising***
- ***Learning to calm your fears in ‘making the ask’***
- ***Maintaining professionalism in fundraising endeavors***

The BIG Picture of Fundraising

2020 = \$ 471.44 Billion Donated



Who Gave the Money in 2020

Individuals 69%

Foundations 19%

Corporations 4%

Bequests 9%

Making The Ask – Calming Fears

What are you asking for? Money, time, talent, other* . . .

Why do you want it? What will you do with it?

Who are you asking? Individuals, Groups, Businesses/Corps

When do you want it?

Be Prepared - Build Relationships

Why Professionalism is Important

- AAUW is a national leader in education and equity, we want our fundraising/philanthropy to be as professional as our reputation
- **We've been given the gift of a nonprofit status-- 501(c)(3)-- and we MUST protect this status.** It can be revoked if we fail to comply with regulations

Why Professionalism is Important

Maintain professionalism in all fundraising efforts

Resources for Guidance

- *Donor Bill of Rights*
- *AAUW Fundraising Policy #501 (new in 2014)*
- *AAUW Scholarship Policy #503 (new in 2014)*
- *IRS Publications #1771 and #526*

IRS – ‘Use of Name’ Issues

- ❖ Funds raised using the AAUW (national) name must go to support AAUW national programs, activities and services (AAUW Fund) or other directly mission-related purposes.
- ❖ Funds raised using the name of the AAUW-affiliated entity (branch/state) must go to support programs, activities and services or other directly mission-related purposes of the AAUW-affiliated entity.

(NOTE: It is acceptable to pay a program stipend to an organization that does a branch program IF you USUALLY give a stipend to speakers. This comes out of the program budget.)

IRS – ‘Use of Name’ Issues

FLORIDA

- ❖ AAUW Fund – National
- ❖ AAUW Florida Supporting Foundation – State (Tech Trek)
- ❖ AAUW Branch Foundation – Local Scholarships
- ❖ Must register to fundraise outside of membership

IRS - Common Mistakes

Details in IRS Publications #526 & #1771

- Raffles are NOT tax-deductible; no ‘games of chance’ are considered deductible
- At Special Events, the costs of “Goods and Services” to the donor must be determined at their “Fair Market Value” and those costs deducted from the ticket price; remainder is considered a charitable deduction

(Goods and Services = food/meal, beverages/alcohol costs, parking, entertainment/music, gifts/favors; anything that is a direct benefit to the donor. Does not include decorations, invitations, centerpieces, table/chair rentals, cost of venue, etc.)

IRS - Common Mistakes

- Must declare in advance where funds will be used; funds must be directed to the purpose for which they were raised
(Donor intent)
- Only donors can value donated goods/items
- Auction purchases are only a donation if you pay over fair market value; and only the amount paid above the fair market value is allowed
- Local scholarships are not tax-deductible

A 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 ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I.

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.

VI.

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

II.

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

VII.

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

III.

To have access to the organization's most recent financial statements.

VIII.

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IV.

To be assured their gifts will be used for the purposes for which they were given.

IX.

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

V.

To receive appropriate acknowledgement and recognition.

X.

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

DEVELOPED BY:

Association of Fundraising Professionals (AFP)
Association for Healthcare Philanthropy (AHP)
Council for Advancement and Support of Education (CASE)
Giving Institute: Leading Consultants to Non-Profits

ORIGINALLY ENDORSED BY:

Independent Sector
National Catholic Development Conference (NCDC)
National Committee on Planned Giving (NCPG)
Council for Resource Development (CRD)
United Way of America

Developed in 1993
by major fundraising
organizations.

Adopted by many
national and local
nonprofit
organizations.

AAUW has adopted this
document.

Adopted in 1993

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Donor Bill of Rights – 3 Key Issues

- I. 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.
- IV. To be assured their gifts will be used for the purposes for which they were given. (Donor intent)
- VI. To be assured that information about their donation is handled with respect and with confidentiality to extent provided by law. (Don't ask, won't tell!)

Where Does AAUW Money Go?

**To the Mission: Advancing gender equity for women and girls
through research, advocacy and education.**

Greatest Needs Fund (# 9110)

Education & Training Fund (# 4450)

Economic Security Fund (# 4449)

Leadership Fund (# 4452)

Governance & Sustainability (# 4451)

See AAUW website for fund descriptions

Where Does AAUW Money Go?

To the Mission: Advancing gender equity for women and girls
through research, advocacy and education.

Greatest Needs Fund (# 9110)

- ❖ Allows AAUW to respond rapidly to critical, emerging issues affecting women
- ❖ Allows AAUW to pivot as the national dialogue shifts
- ❖ Fuels groundbreaking research and effective advocacy work

Where Does AAUW Money Go?

To the Mission: Advancing gender equity for women and girls
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Education & Training Fund (# 4450)

- ❖ Addresses barriers that prevent women from thriving in school and pursuing career dreams
- ❖ Champions equal access to education
- ❖ Ensures women can learn in environments free from harassment and discrimination

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Economic Security Fund (# 4449)

- ❖ Promotes women's livelihoods through advocacy for fair-pay legislation
- ❖ Researches the pay gap
- ❖ Trains women to negotiate for salaries they deserve
- ❖ Advises employers on fostering fair cultures

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Leadership Fund (# 4452)

- ❖ Supports efforts to bolster number of women in top roles across industries
- ❖ Works to addresses systematic biases in the workplace
- ❖ Helps give women the skills and resources they need to lead

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through research, advocacy and education.

Governance & Sustainability (# 4451)

- ❖ Enables AAUW to function as effectively and efficiently as possible
 - ❖ Helps incorporate state-of-the-art technology into member database and other systems
 - ❖ Enables AAUW to follow the latest in best practices for governance and hiring
-

Mission: Where Does AAUW Money Go?

AAUW in Washington DC

- ❖ Building/location/expenses
- ❖ Professional, qualified staff (Pay Equity)
- ❖ Technology/equipment

Continuing Programs

Fellowships

(2021-2022 = nearly \$5 million to 260 women and community projects)

Research

Legal Advocacy Fund (LAF)

Donors Today

1. More sophisticated; give to many other causes; understand IRS regulations and donor rights. We have to stay current!
2. Donors understand need for funding of operations and general agency costs; leadership development
3. Many more women donors – Giving Circles, recognition in own name, increased gift amounts . . .
4. THEIR choice in where they give - - local, state, national or ALL three levels; we just put opportunities before them

How Do We Get the Money?

- Auctions
- Award Events
- Book Sales
- Direct Appeals (letter, reply form, return envelope)
- Drawings (NOT Raffles)
- Luncheons/Dinners (Author, VIP, Celebrity)
- Phantom Events/Non-Events
- Sale of Items (food, jewelry, plants. . .)
- Tours (House, Church, Architectural . . .)

How Do We Get the Money?

Florida AAUW - Website Ideas

Gold Rush Party

Picture Perfect

Portable Magic

Equal Pay Day Panel

Honor Local Women

A Tisket A Tasket, A Green and Yellow Basket

Let's Do Lunch

Promote Giving: Donor Recognition

1. Thank you letter
2. Name in program book, newsletter, on website, on social media
3. Giving Clubs - receive certificate, pin, mug, plate, plaque . . .
4. Recognition at luncheon, dinner, special event . . .
5. In Memory of / In Honor of - donations to branch or to AAUW
6. Anonymous Donors – verify details and “how anonymous” they want to be; respect their wishes

Florida State: \$750 gift = One member honored with Named Gift

Record Keeping

1. National does thank you receipts for all National gifts
2. 501(c)(3)s can do official thank you receipt; 501(c)(4)s can't, they do unofficial thank yous (include 'No goods or services' statement, or list value of goods or services in official letter)
3. Quarterly AAUW Fund Giving Reports sent to Fund Chairs; need to review and verify; notify of corrections
4. On-line giving more popular, easier to track; QR codes

Record Keeping

6. Gift Documentation - Be aware that donors cannot take tax deductions for gifts of \$250 or more unless they have documentation from the charity that received the gift.
7. Gift Documentation - The IRS requires that the acknowledgment include the name of the charity, the amount of the donation, the date of the donation, and a statement that no goods or services were received in exchange for the gift; or the value of those goods and services are identified.

Connect@aauw.org - Angela Cooper
Development Office - Tremayne Parquet

Diane's Closing Thoughts

Fundraising IS a profession.

Fundraising can be FUN!

Fundraising is a TEAM endeavor!

Fundraising helps change the world - - locally, regionally, nationally and globally.

**THANK YOU FOR DOING YOUR PART FOR AAUW
as together we advance gender equity for women and girls
through research, advocacy and education**

Q & A TIME

THANK YOU!

for taking the time to discuss the

AAUW Fund

and your role in keeping AAUW strong as we **advance gender equity for women and girls through research, advocacy, and education.**

Diane B. Ludwig, AAUW Fund Enthusiast!

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