Scholarship Fundraising Toolkit

Standard practices for Alumni Groups to engage donors through branding, communication materials, events, and strategic partnerships.
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1. **Branding & Communications**

It is important to establish a brand for your group and remain consistent with this brand throughout all communications and interactions. A brand helps donors hear about, remember, and connect with a specific group. The purpose of a brand is to establish an emotional connection with the donor, which helps with engagement, fundraising and stewardship.

**Values of Your Group**

- In considering any additional values of your specific group, keep in mind that the Diversity Alumni Groups are based on the following six values: Honesty, Community, Education, Empowerment, Inclusive, Diversity

**Elevator Pitch**

The pitch itself may take a few iterations and practice to develop a persuasive and compelling (but brief!) story.

**Components:**

- Who you are and what you do
- What the organization does/its mission statement
- Why should your audience engage with you?
  - A call-to-action or opportunity to highlight for the donor/audience
- Avoid using any jargon or unnecessary formality

**Mission Statement**

What does your organization do?

What differentiates your organization from others?

- Tailor your message to the individual or group you are addressing. How does your mission relate to the donor?

**Timeline of Goals**

Establish a timeline in terms of building a pipeline, establishing partnerships, and reaching fundraising goals. Things to consider:

- **Trends of past giving**: Look at historical giving to your specific group and set goals for the following year according to funds raised and the number of donors contributing these funds.
- **Leverage Network and Community milestones** (eg. 10th Anniversary) as engagement and funding opportunities
- **Set goals that are realistic** with your current volunteer base and resources. Keep in mind volunteers’ capacity for certain types of events and time commitments
2. Fundraising 101

Annual Gifts/Solicitations

Elements to Remember:

- Establish and maintain a web presence with language associated with giving, showing impact or updating constituents on progress and goals
- Keep development goals in mind throughout communications
  - Eg. “If you are interested in making a donation, please visit [web page] here.”
  - Eg. “Our fundraising last year made it possible for x students to attend UCLA and pursue their goals”

Please note that these email templates are currently being used by the Office of Scholarships and are to be used for reference only. Please do not duplicate language; instead, please use as a guide to creating your own templates.
Sample Constituent Update Email:

UCLA Office of Scholarships

24 Colorado Students Westwood Bound

Dear [[FirstName]],

At nearly 100,000 undergraduate applications received this year, our university attracts more students than any other university in the nation.

We are excited to announce that from a record 347 applications received by UCLA from Colorado, 98 students were admitted and 24 students intend on enrolling at our university.

This is a 20% increase in the number of enrolled students from Colorado from last year.

These 24 newest Colorado Bruins are some of our nation’s best and brightest. They have worked hard to earn their place at UCLA, and we are excited to have them on campus.

UCLA is committed to supporting our Colorado students through the UCLA Alumni of Colorado Network Scholarship, and recently your network leadership completed their selection process.

We join you in celebrating your scholarship recipient for the fall 2013 academic year. Her name is:

Catherine K.
Littleton High School
Denver, CO

Soon we will be wishing all of our new Colorado students well as they head for UCLA at the Colorado Bruins Send Off Event on Saturday, August 10th.

As dedicated alumni, proud parents, donors, volunteers and friends, your support of the UCLA Alumni of Colorado Network Scholarship keeps UCLA competitive by recruiting the best students from your state.

Yet there are countless ways to continue to support current and future UCLA scholars through the Bruin Recruitment Program and Alumni Affairs. For additional questions or information on the Colorado network scholarship, please contact UCLA Office of Scholarships at (310) 983-3062, or via email at UCLAScholarships@support.ucla.edu.

It’s an exciting time for UCLA and our Bruins from Colorado, and the future is only getting brighter.

From all of us at UCLA, thank you for your continued support and commitment to scholarships, and keeping our university a gateway of opportunity for our amazing students.

Sincerely,

Your UCLA Student Support Team
Sample Solicitation Email:

Date
Street
City, State Zipcode

Dear <FirstName>,

My name is <Your Name> and I am <your title or role> in <your office or group>. During my time here, I have met incredibly dedicated volunteers and supporters, like you. I truly share your dedication and enthusiasm to ensuring that the brightest young minds can fulfill their dreams of attending UCLA.

As I am sure you are well aware, the academic and extracurricular opportunities offered at UCLA provide a formative foundation for our students’ futures. We have a vision to ensure that formative experience is shared by current Alumni Scholarship recipients.

I am asking you to help make that vision a reality. Your contributions will not only fund scholarships, they will provide an opportunity for you to have a lasting impact on the lives of our amazing Alumni Scholars. If you have not already done so this year, please consider donating to the program here. If you prefer to make your gift over the phone, please do not hesitate to call <name of person processing phone gifts> at <phone number>.

Thank you again for your continued support of the Alumni Scholarships Program. I look forward to speaking with you soon.

Should you have any questions about scholarship opportunities and the <group name> activities, please do not hesitate to contact me at <phone number> or <email address>.

Go Bruins!

Warm regards,
<Your Name>
Major Gifts/Naming Opportunities

- Contact the Development Office if you have identified a potential major gift prospect
  - Explain the connection that you or a member of the group has with this prospect
  - Also include the reasoning as to why you think this prospect has potential to be a major gift donor
  - Assess the willingness of the donor to be involved in a meeting with the UCLA Development Office
- Additional benefits of including the Development Office:
  - We may have an established relationship with the donor
  - We have the support system and experience to assist in navigating these interactions

Impact of Major Gifts

- Of the $1.61M raised in FY16, 84 were gifts larger than $10K
- The remaining $980K was raised in gifts of less than $10K from 10,586 donors
- Major Gifts have the potential to make a huge impact on our goals from a handful of donors

Opportunities for Recognition

- Be sure to give special recognition to major gift donors at events
  - Emphasize how meaningful the gift from the donor is to the Alumni Group
- Naming Opportunities
  - This is a great way to grow the endowment for the particular group, especially with those vested in the Alumni Group
  - This also promotes involvement and continued engagement between the donor and the Alumni Group
  - Provides opportunity to continue funding indefinitely while maintaining the branding of the fund itself
  - An opportunity for the donor to leave a legacy
Planned Giving
Planned Giving does not only include estate planning but also includes trusts, gift annuities, and IRA rollover.

CHARITABLE GIFT ANNUITY
SUPPORT UCLA WITH A GIFT THAT SUPPORTS YOU.

A UCLA charitable gift annuity is one of the easiest ways to support your philanthropic interests. In exchange for your gift of cash or appreciated securities, you receive fixed income for life. You also benefit from an immediate charitable income tax deduction, and a significant portion of the annuity payments is tax-free.

BENEFITS

- Establish a charitable gift annuity to support any area of UCLA that interests you.
- Receive fixed, lifetime income that will not fluctuate with the economy.
- Many UCLA donors fund multiple charitable gift annuities over several years and create a secure and tax-savvy supplement to their retirement income.
- Establish an annuity to provide income for one or two annuitants, such as yourself and/or loved ones.

TAX ADVANTAGES

- Take advantage of significant tax savings through an immediate charitable income tax deduction.
- Any unused deduction may be carried forward in subsequent tax years, for up to 5 additional years.
- A significant portion of your annuity payments will be tax-free for a number of years.
- Fund your annuity with appreciated stock and reduce capital gains tax.

The CENTENNIAL Campaign for UCLA
HOW IT WORKS

- A charitable gift annuity is a simple contract between you and The UCLA Foundation.
- The minimum amount to establish an annuity is $10,000.
- The payment rate is determined by the annuitant’s (beneficiary’s) age (minimum age is 65). The older the annuitant (beneficiary), the higher the payment rate.
- Choose to have your payments start immediately or at a later date. Deferring the payments increases the payment rate, and many donors take advantage of this for their retirement plans.
- Enjoy an immediate and significant charitable income tax deduction.
- A portion of your annuity payments will be tax-free for a number of years.
- After the lifetime of the annuitant (beneficiary), the balance of the annuity passes to UCLA for the purpose you designated.

UCLA’s gift planning professionals are happy to provide you and your legal and financial advisors with personalized illustrations of the benefits that a charitable gift annuity offers. Any information in this publication is not intended as legal, accounting, or financial advice. Please consult with your tax, legal, and financial advisors to ascertain whether this or other gift plans are in keeping with your own tax and financial needs. Conversations with the university’s gift planning team are always confidential and never imply obligation.

For additional samples of Planned Giving documents (such as Giving through your Will or Trust, or Charitable Remainder Unitrust), please contact the Office of Scholarships and Student Support Initiatives (ucluscholarships@support.ucla.edu)
In-Kind Donations

- The gift amount and tax-deductible amount are not printed on the receipt, this information is usually provided by the donor on the Deed of Gift Form
  - The Deed of Gift form is signed off by the donor, the Department, and Gift Acceptance and sent along with the receipt to the donor.
Sample In-Kind Gift Receipt

LET THERE BE ... ABUNDANT APPRECIATION
Thank you for your gift. Your generosity helps ensure UCLA's continued excellence. Together, there is no limit to what we can accomplish.

Gave to Work
Gave to Other

0017/0000
Mr. Joe Bruin
Mrs. Sue Bruin
10920 Wilshire Blvd
Los Angeles, CA 90024-6516

GIFT RECEIPT
Date: 9-06-2016
Receipt Number: rcv-1400000

Gift Details:
Art Work

Designation: Department of Psychology; Regental Fund
Gift Amount
Tax-Deductible Amount

THANK YOU!

PLEASE RETAIN THIS RECEIPT FOR TAX PURPOSES. IMPORTANT TAX AND OTHER INFORMATION IS ON REVERSE.
Your gift to UCLA is deductible unless your organization instructs otherwise. Contributions of employer stock or options, contact your human resources representative for instructions.

Thank you for your generosity.
Sample Deed of In-Kind Gift

DEED OF GIFT

TO THE REGENTS OF THE UNIVERSITY OF CALIFORNIA:

I (we) ___________ of the property described below:

Property

Title, Description, and Value (if applicable)

VALUE (for insurance purposes):

Please check one:

Value Established by:

Donor Department Other (please specify)

I (we) desire to transfer said property as a gift to THE REGENTS of the University of California for the benefit of the Los Angeles Campus of the University.

I (we) do hereby irrevocably assign, transfer, and give up all my (our) right, title, and interest in and to the above described property to THE REGENTS of the University of California for the benefit of the University of California, Los Angeles.

I (we) have hereunto set my (our) hand(s),

(day of ___________, 20__)

FOR DEPARTMENTAL USE ONLY

Signature of
Departmental Official

Title

Date

Accepted for THE REGENTS
of the University of California

Office of University Affairs

Department:

Date:
Stewardship
Stewardship is relationship building that takes place between the donor and the UCLA unit to which they donated. When stewardship best practices are followed, the donor is more likely to give after their initial gift. Stewardship activities include acknowledgements (including thank you letters), impact reports, information about student recipients (if for scholarships) and general updates on the performance of their fund.

- Your group will be notified of any new student recipients during the Fall Quarter.
- If you get a response to a thank-you card with a request for more information, treat this as an opportunity to engage. Pay particular attention to those who have given lower gifts but have a high capacity to give.
- Part of stewardship is sharing a measure of impact with the donor and your constituents. Things to keep in mind:
  - Share the impact that a donor’s gift has had on UCLA
  - Include impact pieces in regular communications in an aggregated manner with all constituents. This helps to encourage others to give to make a similar impact.
- Note that the below sample Thank You letters are meant to serve only as a sample. Use letterhead specific to your alumni group and create a template to have specific stewardship, to supplement the administrative donation confirmation that is issued by UCLA.
Sample Thank You Letter #1 (with recent interaction):

Dear <Name>:

It is my pleasure to thank you for your continued support of UCLA Alumni Scholarships. Enhancing support for undergraduate education is one of our highest priorities, and we are grateful for your ongoing partnership in providing scholarship support for members of <group name>.

[If you had a recent interaction with a donor]: Thank you kindly for taking time to meet on <date>. I have since spoken with <relevant party> and <he/she> is thrilled that you will be funding an additional <$amount> to the <group name scholarship fund>. Please feel free to mail your gift in the self-addressed envelope enclosed. If you would like to make your gift via credit card, please contact my assistant, <name and phone number of assistant or whoever will be processing credit card gift> as <he/she> will be able to process your gift via phone.

We look forward to hosting you and <any other family members or guests> at the upcoming <event> to be held on <date of event>. The event is from <time> at the <location>.

Thank you again for your unwavering support of our students and the UCLA <group name>. If you need any additional information please do not hesitate to contact me.

Best regards,

<Name>
Contact info>
Sample Thank You Letter #2:

Office of Scholarships
10920 Wilshire Blvd. Suite 900
Los Angeles, CA 90024

<Date>
<Contact Name(s)
Street
City, State Zip>

Dear <Name(s)>,

Thank you so much for your support of the Alumni Scholarships Program. We are committed to awarding students who demonstrate extraordinary leadership, academic excellence and a vision to make a positive impact on our global society. By supporting UCLA’s oldest and most prestigious scholarship program, you provide an extraordinary opportunity for our incredibly deserving and highly accomplished students.

Your gift to the <specific group> ensures <group of Bruins> the opportunity to pursue an incredible collegiate experience without shouldering great financial burden. Through your support, you continue to build this community of Alumni Scholars and provide them unparalleled resources to connect them to their dreams.

Please know how grateful we are to have your support and see the legacy of philanthropy carried forward through your gift to these students. We hold you in high esteem and are fortunate to have amazing UCLA alumni and friends like you positively impacting future UCLA scholars.

We look forward to communicating with you again soon. Should you have any questions regarding your donation, please do not hesitate to contact the UCLA Alumni Scholarships Program at (310) 983-3062 or AlumniScholarships@support.ucla.edu.

Sincerely,

<Signature>
>Title
Office>
Sample of Donor Reports - to be included in the future, once these reports have been generated
Sample Stewardship Language for Diversity Groups:
Please note that this language is being used for stewardship by the Office of Scholarships. Please use only as a guide and modify to fit your tone and purpose.

Eg. Your gift to the UCLA Asian Pacific Alumni Scholarship Fund ensures Asian Pacific Bruins have the opportunity to pursue an incredible collegiate experience without shouldering great financial burden. Through your support, you continue to build this community of Alumni Scholars and provide them unparalleled resources to connect them to their dreams.
### 3. Student Applications – Overview:

- Applications can be reviewed in a group setting (in-person) or virtually by a pool of more than 1,000 volunteers
- Deadline to apply for Freshmen is in February, deadline to apply for Transfers is May (however, both deadlines may be pushed earlier to coincide with Financial Aid announcements)

#### Freshmen – Sample Selection Cycle Timeline

<table>
<thead>
<tr>
<th>Date(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saturday, February 20</td>
<td>Volunteer Information Session – Southern CA</td>
</tr>
<tr>
<td>Sunday, February 21</td>
<td>Volunteer Information Session – Northern CA</td>
</tr>
<tr>
<td>Friday, February 26</td>
<td>Freshman Application Deadline</td>
</tr>
<tr>
<td>March 17-18</td>
<td>Receive admissions data, Prepare application review packets</td>
</tr>
<tr>
<td>Saturday, March 19</td>
<td>Freshman Application Review Session: Virtual</td>
</tr>
<tr>
<td>Sunday, March 20</td>
<td>Freshman Application Review Session: Fresno-Central CA</td>
</tr>
<tr>
<td></td>
<td>Orange County – Anaheim</td>
</tr>
<tr>
<td>Friday, March 25</td>
<td>Cesar Chavez Holiday, Good Friday</td>
</tr>
<tr>
<td>Saturday, March 26</td>
<td>Freshman Application Review Session: Los Angeles, San Diego – La Jolla</td>
</tr>
<tr>
<td>Sunday, March 27</td>
<td>Easter Holiday</td>
</tr>
<tr>
<td>Saturday, April 2</td>
<td>Freshman Application Review Session: Santa Clara, New York</td>
</tr>
<tr>
<td>Sunday, April 3</td>
<td>Freshman Application Review Session: Walnut Creek, Washington DC</td>
</tr>
<tr>
<td>Sunday, April 3 - Midnight</td>
<td>Virtual and all event scores due</td>
</tr>
<tr>
<td>April 4 – 5</td>
<td>Scores compiled. Sent to statistician for normalization</td>
</tr>
<tr>
<td>April 4 – 8</td>
<td>Finalize regional interviews with volunteer networks, Invite candidates for interview</td>
</tr>
<tr>
<td>April 6 -10</td>
<td>Regional Freshman Interviews</td>
</tr>
<tr>
<td>April 12 – 13</td>
<td>Award 1st Round of Freshman Alumni Scholars, Invitation to Bruin Day, Invite National Finalists</td>
</tr>
<tr>
<td>Saturday, April 16</td>
<td>Bruin Day / Cal Day</td>
</tr>
<tr>
<td>Friday, April 22</td>
<td>Passover Holiday Begins</td>
</tr>
<tr>
<td>Saturday, April 23</td>
<td>Alumni Scholars Club Welcome Day</td>
</tr>
<tr>
<td>Sunday, April 24</td>
<td>National Finals</td>
</tr>
</tbody>
</table>

#### Transfer Students – Sample Selection Cycle Timeline

<table>
<thead>
<tr>
<th>Date(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Freshmen</strong> – Sample Selection Cycle Timeline</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Transfer Students</strong> – Sample Selection Cycle Timeline</td>
</tr>
</tbody>
</table>
### Sample Scoring Rubric

**UCLA Alumni Scholarships Program**

**TRUE BRUIN DISTINGUISHED SENIOR AWARD APPLICATION RATING SCALE**

The goal of this scale is to evaluate the applicant on their True Bruin Values, leadership skills and/or outstanding accomplishments and participation within a context of demonstrated academic excellence. Application Readers should utilize the full point spread (0-80) in evaluating each application and mark it in the associated Score Sheet (see Drop Box).

<table>
<thead>
<tr>
<th>To evaluate...</th>
<th>Total Points</th>
<th>Comments</th>
<th>TRUE BRUIN VALUES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Activities</td>
<td>0-15</td>
<td>Was the student involved in multiple activities at UCLA and in the community? Did the student demonstrate True Bruin values? Was the applicant committed for more than one year?</td>
<td><strong>Integrity</strong>&lt;br&gt;• Conducts themselves with integrity in their dealings with &amp; on behalf of the University. Excellence&lt;br&gt;• Conscientiously strive for excellence in their work. Accountability&lt;br&gt;• They are accountable as an individual &amp; member of this community for their ethical conduct. Respect&lt;br&gt;• They respect the rights &amp; dignity of others. Service&lt;br&gt;• They make an impact in our global community through public service.</td>
</tr>
<tr>
<td>One Time Activities</td>
<td>0-10</td>
<td>Was the student involved in a variety of activities? Did the student demonstrate True Bruin values?</td>
<td><strong>Individual Leadership Qualities</strong>&lt;br&gt;• Shows initiative, takes charge, sets priorities. Accepts responsibilities willingly and eagerly. Exhibits perseverance, ingenuity, creativity, and dynamism in solving problems.</td>
</tr>
<tr>
<td>Depth of Involvement</td>
<td>0-10</td>
<td>Did the student take a leadership role in any of these activities and emphasizes the True Bruin Values? Were they involved for extended periods of time and hours?</td>
<td><strong>Group Leadership Qualities</strong>&lt;br&gt;• Sets an example through commitment and action. Delegates, trusts and shares the responsibility and the credit. <strong>Social Perseverance</strong>&lt;br&gt;• Skilled in dealing with people, shows social perceptiveness.</td>
</tr>
<tr>
<td>Special Distinction</td>
<td>0-10</td>
<td>Has the student accumulated academic, non-academic honors and community distinctions since they left high school? Evaluate the number and difficulty of the distinctions.</td>
<td></td>
</tr>
<tr>
<td>Essay Quality &amp; Content</td>
<td>0-30 (20 points for first, 10 points for second)</td>
<td>How hard did the student work on the application and the essay? Does it look like something that was thrown together at the last moment, or something laborious? Is it professional and does it show that the student took the scholarship seriously? Student must demonstrate insight into their personality, values and life as well as demonstrate good writing skills.</td>
<td></td>
</tr>
<tr>
<td>Letter of Support</td>
<td>0-5</td>
<td>Consider the source. Does the recommender appear to know the student well and emphasizes the student's True Bruin Values? Is the recommender a credible source, and not a fellow student or family member?</td>
<td></td>
</tr>
<tr>
<td>+ GPA Score</td>
<td>0-10</td>
<td>GPA Score will be added by the Alumni Scholarships Program and submitted by the Registrar's Office</td>
<td></td>
</tr>
</tbody>
</table>

#### 4. Events with a Fundraising Purpose

- When planning an event with a fundraising purpose, please share your invite list with the Development team. The Development team may be familiar with some of your attendees and be able to provide you with valuable information. The Development team can also help with establishing fundraising goals for the event based on past experience.
- Before planning an event, determine the following:
  - Purpose of event
Set goals in terms of the outcome of the event (eg. fundraising level, new members, donor engagement, etc.)
How to engage students
What approval is necessary

Event Logistics

**Pre-Event Checklist:**
- **Save the Date**
  - Choose date and time (if students are involved, avoid midterms and finals as much as possible)
  - Choose location (based on # of guests, tone of event, time of year, check whether in-kind gifts are an option)
    - Reserve venue
  - Check with Development Events to confirm no conflicts in their schedule
  - Contact key staff to reserve their time on calendar
  - Send Save the Date mailing approx. 1.5-2 months prior to event
  - Coordinate with Catering
- **Compile guest lists**
  - Internal
  - External
- **Student invitation**
  - Send approximately 1 month prior to event
- **Donor Invitation**
  - Send approximately 1 month prior to event
- **Staff invitation**
- **RSVPs due ~2 weeks prior to event**
  - Follow Up: Call students and donors to secure remaining RSVPs
- **Schedule briefing with key staff**
  - Develop briefing document
  - Approximately 1 month in advance
- **Parking required for any attendees**
  - Obtain parking passes
  - Provide parking instructions to attendees via reminder email
- **Request any dietary restrictions of attendees**
- **Email reminder with additional information**
  - 1 week in advance
  - 2 days in advance
- **Create document with details on donors’ giving history, areas of support, UCLA affiliation, etc. for engagement at event**
- **Source a photographer/videographer**
- **Create program for event details (including itinerary, speaker bios)**
  - Walk-through of program and venue
**Day-of Event Details**

- Name tags printed
  - Students
  - Donors
  - Admin/staff
- Table tents printed (if applicable)
- Catering coordination
- Photographer direction
- Request thank you letter from Chancellor (if applicable)
- Request thank you letter from key staff
- Send flowers
- Send thank you letters to internal staff
### Briefing for [Name of Event]

<table>
<thead>
<tr>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time:</td>
</tr>
<tr>
<td>Location:</td>
</tr>
<tr>
<td>Arrival Time:</td>
</tr>
<tr>
<td>Attire:</td>
</tr>
<tr>
<td>Event/Staff Contacts:</td>
</tr>
<tr>
<td>Staff Attending:</td>
</tr>
<tr>
<td>Event Purpose, Goals &amp; Objectives:</td>
</tr>
<tr>
<td>Talking/Discussion Points:</td>
</tr>
<tr>
<td>Long Term Strategy:</td>
</tr>
<tr>
<td>Event Format &amp; Program:</td>
</tr>
<tr>
<td>Post Event:</td>
</tr>
</tbody>
</table>
Name Tag Template

**UCLA**

«first_name»
«last_name»
«class_year_degree» «children_class_year»
«pref_business_title»

Student Instructions Template
Thank you for joining us for the [EVENT NAME]. The purpose of this event is to celebrate and recognize [EVENT PURPOSE].

During the event, you will be seated with UCLA alums, donors, and staff who are interested in hearing more about your time as a UCLA student and specifically how [SCHOLARSHIP/CENTER/FELLOWSHIP/ETC.] has impacted your time on campus. Please think about the questions below before the event. We recommend you use these topics during the luncheon to foster conversations with others seated at your table. Please only share personal stories or hardships to the extent you are comfortable.

- Why did you choose UCLA?
- What activities or causes are you involved in on campus?
- How has [SCHOLARSHIP/CENTER/FELLOWSHIP/PROGRAM/ETC.] supported you as a student?

If you are speaking with an alum, donor or staff, you might also consider asking them some of the following questions to foster a conversation:

- How have they been involved with [CENTER/PROGRAM]?
- What is their favorite memory from campus?
- Why did they choose UCLA?

Here are a few quick reminders about the luncheon:

- Arrive no later than [TIME] at the [LOCATION].
- Dress is business casual (i.e. no jeans or t-shirts). We strongly encourage you to wear blue and gold. Please refrain from wearing red.
- If you run into any emergencies on the day of the event, please contact NAME at phone number.

Thank you again for joining us at the [EVENT]!
5. Best Practices

- Engaging students today fosters an alumni relationship for the future
- Have the students speak at events, be featured in newsletters, and included in any other marketing materials
  - Whenever possible, use student quotes to personalize the message
- Partner with the Development Department

How to Start a Scholarship Fund

- If a donor would like to start a scholarship fund, make sure to show your gratitude and express how much this gesture can help UCLA students. Eg. Thank you for considering UCLA for such a generous gift. This is a great way to help our students bridge the gap between the rising cost of education and declining State support for Higher Education institutions.
- Contact the UCLA Development Office
- Things to consider:
  - Does scholarship criteria requested by the donor ensure that it will best serve the University and the receiving student?
  - Do the scholarship criteria allow for a reasonable number of qualified students?
  - Does the amount appear to be sustainable for annual awarding of students?
  - Are there any existing scholarship funds that serve the same purpose?
  - Are there current campus initiatives that are similar and may detract from giving to this scholarship?

Engaging volunteers

- Remember: From Westwood to the West Indies, there is a role for everyone
- Volunteers are needed to serve as leaders, participate in the selection process, be engaged with the scholars, help sustain and grow the program through donations and outreach, and advocate for scholarships through their communities, networks, and friends
- Alumni participation rate is currently hovering around 10%, meaning there is a great opportunity for increased participation in coming years!
**Sample Volunteer Engagement Document**

**We need you.**

**Give.** Make your financial commitment to scholarships, fellowships and student program support today, through cash, securities gift, and/or planned gift.

**Connect.** Get to know UCLA through Student Affairs outreach and networking programs, our myriad of student organizations, and our website/social media. Share your ideas on how we can better engage alumni and friends with key campus initiatives that have the greatest impact on our current and future students.

**Learn more.** Understand the case for supporting UCLA scholarships and student programming. Be an advocate by sharing our campaign goals with other alumni and friends. Be able to answer "Why should I support scholarship programs?"

**Get active.** Become involved. Attend UCLA events both on campus and regionally. Invite friends and classmates to join our events. Utilize the great resources UCLA has to offer for everyone in the community. Share with your friends why being involved with UCLA matters - and what it means to you. We are ready to help find ways for both you and our community to be better connected.

**Engage.** Introduce your networks to our UCLA and our scholarship team by hosting small regional gatherings. Invite key UCLA leaders to hosted gatherings for the opportunity to share our vision with others.

**Be an ambassador.** Show your Bruin spirit with pride! Talk about student support initiatives at UCLA functions. We want to ensure that all of our campus partners are aware of the importance we have in the lives of our current and future alumni. Connect with your networks throughout the world to communicate the value of scholarship support. Bring informational materials with you wherever you go. With over 500,000 living alumni, you never know when you will bump into a fellow Bruin.

**Stretch yourself.** Schedule time to introduce Student Affairs directors and program leaders, as well as our development team, to a prospect in your network, and inspire them to get connected through various avenues. Make yourself available to join the Student Support Initiatives team on meetings with prospects to tell your story and explain why you support our work. Meet with development staff to be a part of reviewing lists, identifying prospects, and making personal connections.

**Share our community.** Our alumni are proud of their school spirit. As a UCLA "insider," you will have the opportunity to engage with alumni to find out what makes them "True Bruins." Learn more about their experiences and how they would like to be a part of our family. Let those personal stories inspire you, energize you, and give you a greater sense of pride when you say, "Go BRUINS!"

On behalf of every UCLA student who has received a scholarship or been involved in a campus organization, as well as more than 40,000 current students who have benefited from your willingness to give back...

**Thank You.**

LetThereBe.ucla.edu
Sample Volunteer Engagement Email

Dear [[FirstName]]:

We are #1!

With official news that UCLA has once again become the most applied-to university in the country, it is imperative that we make it accessible for top tier applicants to receive a UCLA education. For these gifted students, scholarships can be the deciding factor when choosing UCLA over other schools.

We ask you now, as our regional advocates, to make sure that the best applicants in your community say “YES!” to UCLA. Please join us in support of our phenomenal young Bruins and the future of UCLA. Give to your San Fernando Valley Bruins Scholarship today.

If you have any questions, feel free to call us at (310) 983-3052 or send us a note via email at alumnischolarships@support.ucla.edu.

Thank you again for your generous gifts in support of UCLA and our Alumni Scholarships Program.

Go Bruins!

Sincerely,

James Washington
Director of Development, Campus Wide Scholarships

Katrina Barron
Associate Director, Alumni Scholarships Program
**Giving History Specific to Group (Sample)**

### Gifts from FY 2012- FY 2016

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Scholarship Fund</td>
<td>$154</td>
<td>$500</td>
<td>$500</td>
<td>$2,150</td>
<td>$10,350</td>
</tr>
<tr>
<td>Program Support</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$370</td>
</tr>
</tbody>
</table>

**Gift Amount**

- Scholarship Fund: $154, $500, $500, $2,150, $10,350
- Program Support: $ -

**Gift Count from FY 2012- FY 2016**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship Fund</td>
<td>12</td>
<td>1</td>
<td>1</td>
<td>5</td>
<td>56</td>
</tr>
<tr>
<td>Program Support</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>9</td>
</tr>
</tbody>
</table>

**Number of Gifts**

- Scholarship Fund: 12, 1, 1, 5, 56
- Program Support: 0, 0, 0, 0, 9
6. Contact Information

Campus Partnerships

- Identify areas that coincide with interests and opportunities for engagement and partnerships
  - Various centers, campus initiatives, study groups, etc.

Campus Resources

Please reach out to the relevant contact, as listed below, if you have any questions pertaining to their department.

George Touma
Alumni Scholarships Development
310-983-3065
gtouma@support.ucla.edu

George Brown
Alumni Scholarships Program
310-206-0622
gbrown@support.ucla.edu

Adrian Meza
Financial Questions about your funds
310-825-3371
ameza@support.ucla.edu

Kristine Werlinich
Regional Alumni Engagement
310-825-4676
kwerlinich@support.ucla.edu

Patricia Nguyen
Diversity Programs Engagement
310-825-9225
pnguyen@support.ucla.edu

Cia Ford
Affinity Network Engagement
310-206-0684
ciaf@support.ucla.edu
7. Statistics

- Statistics, when used in communication materials, can emphasize your point in a persuasive manner
  - Visuals displaying statistics can be even more powerful, if easily understood and presented clearly
- Balance being realistic and honest with opportunity and aspiration
  - Eg. Frame low contributions as an opportunity to reach short-term goals and to leave a legacy

Alumni Scholarships:

- 30% of Alumni Scholarships are sponsored by 35 Alumni Networks, totaling 178 scholarships and $264,100
- In FY13-14, Approximately 44% of Alumni are Millennials – digital engagement is a large part of interaction with these alumni
- Individuals who are providing talent (i.e. volunteering) are 3x more likely to give
- Membership in the prestigious Alumni Scholars Club (ASC) includes:
  - Access to cutting-edge leadership development programming.
  - Alumni-to-student mentoring.
  - Networking opportunities with UCLA alumni.
  - Eligibility to receive additional need-based funding – up to $5,000/year.

### AY 2016/17 Alumni Scholars Awarded

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Freshman 2016</th>
<th>Transfer 2016</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>47</td>
<td>11</td>
<td>58</td>
</tr>
<tr>
<td>African American</td>
<td>7</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>White</td>
<td>58</td>
<td>21</td>
<td>79</td>
</tr>
<tr>
<td>American Indian</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Latino</td>
<td>33</td>
<td>11</td>
<td>44</td>
</tr>
<tr>
<td>Pilipino</td>
<td>7</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>Pacific Islander</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Other/ N/A</td>
<td>18</td>
<td>6</td>
<td>24</td>
</tr>
<tr>
<td>TOTAL</td>
<td>174</td>
<td>54</td>
<td>228</td>
</tr>
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</table>

<table>
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<tr>
<th>Special Interest</th>
<th>Freshman 2016</th>
<th>Transfer 2016</th>
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</thead>
<tbody>
<tr>
<td>Foster Youth</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>LGBT</td>
<td>7</td>
<td>7</td>
<td>14</td>
</tr>
<tr>
<td>Legacy</td>
<td>20</td>
<td>1</td>
<td>21</td>
</tr>
<tr>
<td>Undocumented</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>TOTAL</td>
<td>31</td>
<td>10</td>
<td>41</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Freshman 2016</th>
<th>Transfer 2016</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>57</td>
<td>14</td>
<td>71</td>
</tr>
<tr>
<td>Female</td>
<td>84</td>
<td>28</td>
<td>112</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>TOTAL</td>
<td>143</td>
<td>44</td>
<td>187</td>
</tr>
</tbody>
</table>
UCLA

- For over 10 years, UCLA has been the most applied-to University in the U.S.
- A top-ranked public university in the nation for more than two decades (U.S. News and World Reports)

CENTENNIAL CAMPAIGN PROGRESS

- $2.8b DONATED
- $4.2b CENTENNIAL GOAL
- 152,405 DONORS

Note: Update as of Nov. 2016

State Funding

- State funding in California for higher education has been cut over the last decade from $630 million to $379 million
- With today’s economic shift, state funds now constitute only 7 percent of UCLA’s total revenues. As a result, the cost of tuition for a California resident to attend UCLA has increased 72 percent in the past five years
FRAMEWORK

While UCLA is a public University, state funding has steadily decreased. Private giving is urgently needed to assure that UCLA will continue to contribute highly-trained graduates and innovative ideas to our state and our nation.
Dramatic cuts in California state funding over the last decade mean that students today are paying almost five times as much as students just 16 years ago – in 2000.
Financial Need

- Nearly 40% of UCLA students come from families with annual incomes of less than $50,000.
- 52% of undergraduate students receive financial assistance.
- 38% of undergraduates received Pell Grants (federal funding for families with income less than $50,000) – among the highest in the nation.
- 37% of undergraduates received Cal Grants (state funding for students with financial needs and minimum GPA requirements).
- Over half of UCLA students depend on scholarships and grants in order to attend.

<table>
<thead>
<tr>
<th>Financial Aid Package</th>
<th>2014-15</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Typical financial aid package for UCLA undergraduate with total family income less than $60K (Pell Grant eligible)</strong></td>
<td></td>
</tr>
<tr>
<td>Parent Contribution*</td>
<td>$2,497</td>
</tr>
<tr>
<td>Student Responsibility**</td>
<td>$8,700</td>
</tr>
<tr>
<td>Federal/State Grants*</td>
<td>$15,387</td>
</tr>
<tr>
<td>UCLA Scholarship*</td>
<td>$6,079</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$32,663</strong></td>
</tr>
</tbody>
</table>

New Achievements

- More than one-third of UCLA students are the first in their families to attend college.
- For 2016-16 incoming class, 41% would be the first in their family to graduate from a 4-year college.
- Nearly 3,200 international undergraduate students call UCLA their home each year.

Academics

- The average GPA for admitted incoming freshmen is 4.39, with an average SAT score between 1940 and 2240.
- Over 125 majors and over 80 minors are offered at UCLA.
Diversity

- According to *The Chronicle of Higher Education*, UCLA is the nation’s most economically diverse school
- UCLA has been designated No. 6 on College Choice’s list of Best LGBT Friendly Colleges and Universities in 2016 with 24 student organizations and leadership opportunities
  - UCLA’s population identifying as LGBTQ exceeds the national average of 4% – Williams Institute

![Undergraduate Diversity Diagram]

![Gender - Undergraduate Profile, Fall 2014 Diagram]