The Case for the Bates Fund

Supports academic excellence.
A stable operating budget reinforced by generous annual gifts allows the College to hire and retain outstanding faculty who are the best within their areas of expertise.

Ensures Bates’ academic standards and diversity.
More than 40 percent of our students will receive financial aid this year, and we expect an increase in requests, straining the current budget. Financial aid is the best way to attract and retain the most academically qualified students regardless of their financial circumstances.

Helps us stay strong by being flexible.
Your gifts allow Bates to address underfunded, unmet, or emergency needs and gives us the ability to respond quickly to new challenges and opportunities that will advance our mission.

Makes a substantial impact.
It would take an additional $110 million in the endowment, or an increased tuition charge of $3,245 per student, to support what the Bates Fund provides annually. Donors who make unrestricted, current-use gifts have the greatest impact in enabling Bates to meet its mission — right now.

Bears witness to your faith in Bates and in the future.
Your generous gift to the Bates Fund reaffirms your commitment to the College and its values. One student educated at Bates can positively impact the lives of thousands.

Overcoming Objections

Sometimes classmates have questions or comments about their gift to Bates. Here are some of the more common inquiries and suggestions on how to respond. Remember — it is not your responsibility to know all of the answers about Bates and fundraising! If a classmate asks a question you don’t know the answer to, simply say that you don’t know, but you can find out the answer for them. Then, call us.

“Does Bates really need my $25 gift?”
Any gift, regardless of the size, is important. Last year, gifts of $25–$50 resulted in over $100,000 for Bates. Establishing an annual tradition of giving at any level is what is most important: loyalty counts!

“I already gave this year.”
Has he or she given this fiscal year? The Bates fiscal year runs from July 1 to June 30. If your classmate insists that he/she has given, thank him/her for the support and make a notation of your conversation on the call sheet.

“Just put me down for what I gave last year.”
Tell them that we appreciate their continued support of Bates. “This year, we are working to increase our class gift. Would you consider increasing your gift to $__________ ?” (Use ask amount.)
“I always make my gift in June. How can I avoid receiving so many letters?”
Bates sends mail several times during the year, since it has no way of knowing when a donor will make a gift. An excellent way to avoid receiving any additional solicitations is to pledge early in the year. By pledging early, donors can also indicate when they would like to be reminded about their pledge. Pledge payments are due by the end of the fiscal year (June 30).

“I don’t want to simply give money with no idea about where it is going.”
Unrestricted gifts to the Bates Fund support many valuable things at Bates, including scholarships, clubs and athletics, and faculty resources. In fact, a gift to the Bates Fund can be directed to the following specific areas: scholarships, academic excellence, annual library purchases, and residential life.

“I can’t afford to give now; our budget is extremely tight.”
Be sympathetic, and ask him or her to please think about Bates as a very worthwhile investment. A gift of any amount would be beneficial. You can also ask them to consider the Monthly Giving Program, which allows donors to give modest amounts each month.

“Tuition is so high, how much more money do you need?”
As with anything of great value, there is often considerable cost. In fact, there is more than a $15,500 gap per student between tuition-based revenue and the actual cost of providing a Bates education. Annual support from alumni and parents helps make up that difference.

“Send me something in the mail.”
Ask whether there is any specific information that they would like to have about the College. This question usually opens up the conversation and allows you to continue with the appeal over the phone. If your classmate insists on receiving something in the mail, tell him/her that you will mail an appeal envelope.

Tips for Successful Calling

Before the Call

Make your own pledge or gift. Leading by example is the first step to a successful peer-to-peer solicitation. This makes it possible for you to invite classmates and fellow alumni to join you in supporting the Bates Fund this year.

Establish a case for giving. You don’t need to memorize facts and figures, but you should be familiar with the rationale for making annual unrestricted gifts and the priorities those gifts support so you can speak knowledgeably with your classmates. Be prepared to explain why you have agreed to serve as a fundraising volunteer for Bates.

Familiarize yourself with what is happening on campus. Visit www.bates.edu for a wealth of information about today’s Bates.

Review information on potential donors. Find areas where you can make connections. Look for the “ask” amount and plan to ask for that specific amount. Pay particular attention to past giving and whether the donor’s employer has a corporate match program. Many companies will match or even double their employee’s contributions to Bates.
During the Call
Consider sending a letter or an e-mail in advance of the phone call. This allows for thoughtful consideration of a gift.

Let them know right away that you are calling on behalf of Bates. You don’t need to secure the gift right away, but waiting too long to explain the reason for your call can undermine your efforts.

Share your reasons for supporting Bates. Explain why you agreed to serve as a fundraising volunteer for Bates. You should feel comfortable discussing the benefits of a Bates education as well as the College’s needs.

Lead into the gift discussion by thanking the person for his/her past support, if applicable, and then move to the solicitation. Try to make the solicitation as personal as possible and ask for the amount listed on the call sheet.

Be patient and listen. Encourage dialogue. Your job now is to listen attentively and understand how the person feels about Bates and supporting it. Resist the urge to break the silence.

If the person is reluctant to give, it is important to encourage participation at any level. Every gift makes a difference at Bates.

If the response is “yes,” make sure to thank the person for his or her support. The best way to secure the pledge is with a credit card — it’s quick and easy, and it eliminates the need for follow-up phone calls. If the donor is not comfortable giving credit card information over the phone, encourage them to go online. Pledges made without a credit card will be followed up with a reminder from Bates.

After the Call
Complete the bottom portion of the call sheet after each solicitation call with the amount of the pledge. Tear it off and enclose it, with a return envelope, with your note of thanks or, if you are using the volunteer online tools, enter your contact notes and send a thank you e-mail.

When your calls are complete, report back to your staff contact at Bates.

Please remember to:

- Review prospect’s personal information before calling
- Be up-to-date with what is happening around campus
- Be patient and listen
- Verify contact information and correct any changes
- Thank the person for their support
- Be yourself and have fun!
Giving Societies

Mount David Society
The Mount David Society recognizes Bates Fund donors who put the College first in their annual philanthropy. The MDS leadership levels are:

President's Associates
$10,000 and above

Founder's Associates
$1,855–$9,999 (Classes 10 or more years since graduation)

BOLD (Bobcats of the Last Decade)
10 years after graduation $1,855
9 years after graduation $ 900
8 years after graduation $ 800
7 years after graduation $ 700
6 years after graduation $ 600
5 years after graduation $ 500
4 years after graduation $ 400
3 years after graduation $ 300
2 years after graduation $ 200
1 year after graduation $ 100

Bates Cornerstone Society
In recognition of alumni, parents and friends who have given to the Bates Fund for at least five consecutive years.

Ways to Give

Online
Gifts can be made instantly and securely using a credit card at www.community.bates.edu/makeagift.

Credit Card
Bates accepts Visa, Mastercard, American Express, and Discover.
As a volunteer you can take credit card information over the phone. You will need the credit card number, expiration date, card holder’s name as it appears on the card and the amount of the gift. Please check to make sure we have the correct address.
Donors can also call the Advancement Office at 1-888-522-8371 and give their credit card information over the phone.

Monthly Giving
This is a great way for donors to make their gifts over time and it’s a good way to help make a stretch gift.
The program is also great for the environment and the College’s budget: once someone signs up, they will not be solicited again — no more mailings! The money saved goes directly to educating our students. Visit us online at: www.community.bates.edu/makeagift.
Credit cards and checking or savings accounts can be charged by automatic debit at a designated amount. Monthly payments can be set up by calling 1-888-522-8371 during business hours.
Checks
Mail to the Bates Fund, 2 Andrews Road, Lewiston ME 04240-6028.

Gifts of Securities and Mutual Fund Shares
Gifts of long-term appreciated securities and mutual fund shares may be deducted on your tax statement at fair market value on the date of the transfer to the College. For more information, call 207-786-6248.

Planned Gifts
Charitable gift annuities, pooled funds and charitable trusts allow donors to retain an income interest in their gifts while supporting the College at a level greater than might otherwise be possible. Benefits usually include increased annual income, income and estate tax deductions, and avoidance of capital gain. For more information see www.bates.edu/plannedgiving.xml.

Bequests
Because Bates lives on and will educate future generations of students for leadership and service, a wonderful way for alumni and parents to be part of the College’s ongoing mission is to include Bates in their will or retirement plan. For information or sample language for your will, please contact the Office of Gift Planning at 800-762-3145.

Contact Us
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<tr>
<th>Office of Annual Giving</th>
<th>207-786-6225</th>
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<tr>
<td>Toll-free Gift Line</td>
<td>888-522-8371</td>
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<td>Office of Alumni and Parent Programs</td>
<td>207-786-6244</td>
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<td>Admissions Office</td>
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<td>Athletics</td>
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<td>Bates Bookstore</td>
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