

WPI Proven Practices Sample Internal Briefing

Customize this sample briefing to suit your organization and needs.

TO: [Leaders}
FROM: [Your Names}
DATE:
RE: Women & Philanthropy at {Institution}

Objective:

To provide an overview of what a select group of institutions in higher education are doing to meaningfully engage women around philanthropy and leadership at their colleges and universities.

Overview:

Conducted one-on-one interviews with a half dozen university program directors. Over 48 colleges and universities have intentionally created programs centered on leadership, philanthropy, participation, and engagement with their constituents who identify as women. Below are the institutions we interviewed and included brief program highlights and insights on:

{Various Names of institutions}

Rationale:

The impact of giving by women is recognized increasingly as a force in philanthropy worldwide. Much has been written about the transfer of wealth and the power women have in making major and transformative gifts, as well as the convening power they have in groups.

{Below are some stats as of 2020 – use updated ones when possible}

- a. Women hold 51% of the share of wealth in the U.S.
- b. In 2020, personal wealth of women is \$22 trillion, up from \$14 trillion in 2016. (The Chronicle of Philanthropy)
- c. 45% of U.S. millionaires are women and 40% of U.S. households have women as primary breadwinners. (O’Conner, Eileen, Family Wealth Advisors Council. Women of Wealth Study. 2012.)
- d. There are 244 women billionaires worldwide, as of March 2018 (Forbes)
- e. Approximately \$30 trillion in wealth is set to change hands in the next three to four decades, and women are poised to inherit a sizable share from their spouses and aging parents.
- f. Women outlive men by six to eight years (World Health Organization)

Your Institution’s Demographics and Opportunities:

Sample data points might be:

- As of June 2020, there are over 20,000 alumnae in our database. Of the 19,338 alumnae with age information available, 16,185 (83.7%) are under the age of 50.

- With 5,269 alumnae of record having made a gift in the past five years, we have an opportunity to engage up to 62% of women who have not made a gift in the last five years.
- Additionally, we have almost 800 alumnae who have a capacity rating of 4 or higher, and 191 women who have made an XXX size gift or greater.
- We have 265 women serving on one of our boards (includes alumnae and parents) which represents about 40% representation.

Recommendations:

During this initial benchmarking study, the following emerged from our conversations with peers.

1. First and foremost, the theme of leadership, both internally and externally, was central in the direction and success of the programs.
2. Additionally, when due diligence is done internally to inform and guide key metrics for the organization, the program can be built with a customized vision that aligns with our strategies..
3. We may benefit from external assistance in building buy-in among key university leaders and advancement staff, setting preliminary goals and organizational structure to move forward, and framing initial focus group and/or interest meetings and discussions. This will keep the momentum and help us learn from others' experiences.

Addendum

Peer Benchmarking – you might write up what you learned from other institutions and pull-out key themes