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# Donor Love for Life

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Brown University

# The Case for Planned Giving

- ❖ At an institutional level, planned gifts are often the most transformational gifts that an institution receives.
- ❖ For individuals, planned gifts are generally the largest gifts donors make and often eclipse their total lifetime giving.
- ❖ Moreover, research has consistently shown that donors who include a charity in their estate plans give more annually to that institution.



# The Case for Planned Giving

- ❖ Offers high ROI
- ❖ Helps secure future financial stability
- ❖ Increases current use support
- ❖ Inverts traditional donor pyramid
  - (planned gifts are accessible for most everyone)
- ❖ Expands other giving opportunities
- ❖ Deepens donor engagement with organization



# Why Stewardship Is Key

- ❖ Demonstrates impact
- ❖ Inspires increased giving
- ❖ Encourages donor loyalty
- ❖ May encourage conversion of deferred gifts to immediate impact
- ❖ Most gifts are revocable



# Why Stewardship Is Key

**Planned giving stewardship is critical in ensuring that donors maintain and even increase their provisions.**



**This is in part because the majority of planned gifts are revocable. In a recent study, the Sharpe Group\* found that 71% of planned gifts were revocable.**

\* <https://sharpenet.com/give-take/irrevocable-gifts-always-key-success-planned-giving>



# Brown University Planned Giving Stewardship:

Demonstrating Impact, Showing Appreciation, Recognizing Support

- ❖ **Impact Report**
- ❖ **Virtual Events**
- ❖ **In Person Events**
  - ❖ **Philanthropic Leaders**
  - ❖ **Special invites to existing University events**
- ❖ **Donor Profiles**
- ❖ **Exclusive access to University content**



**COLLEGE HILL SOCIETY**

# Demonstrating Impact

## SECURING A BRIGHT FUTURE FOR BROWN

Brown's goal has always been to attract the most talented students and help them realize their full potential. Though the financial situations of these students vary, the University is committed to meeting 100% of an undergraduate's demonstrated need, with scholarship packages averaging \$51,720.

In FY21, we budgeted \$152.8 million for need-based scholarships. We are also in the midst of building a \$100 million endowment for The Brown Promise in order to make permanent the elimination of loans from Brown undergraduate financial aid packages. The need is great, and financial aid will continue to be a top priority for the University.



### Jazmin Piche Cifuentes '19

What I value the most from my undergraduate experience was the incredible wealth of resources Brown offered for both academic and professional advancement. The Center for Careers and Life after Brown offered resume building workshops that clearly demonstrated the nuances that make a stellar resume. The Underrepresented, First-Generation College, and Low-Income Student Center offered financial aid workshops. Various academic departments, such as the Center for Latin American and Caribbean Studies, had competitions for research grants every semester. Academic departments also advertised semester and summer research positions, one of which I completed my junior year. These resources enriched my undergraduate experience outside of academics and extracurriculars.

Due to the pandemic, the Brazilian Fulbright Commission had to delay the start of its program from 2021 to 2022. I hope the experience will help me to improve my Brazilian Portuguese language skills and cultural awareness. In addition, I hope to make connections amongst the Fulbright Commission staff, my students, and the community members in my assigned city. It is my goal to work with Brazilian companies and educational institutions in a legal capacity in the future.

After graduating from Brown in 2019, I worked in Washington, D.C. for the entire 2020 year with a USAID partner company. Right now, in 2021, I am preparing law school application materials while awaiting instructions from the Fulbright Commission.

International legal studies has always been my area of interest, so I plan on applying to law schools in the 2021-2022 cycle.



### Anne Savaria-Watson '19

The quality of my education at Brown was superb. My professors were brilliant, engaged, and truly cared about my development as a human and scholar.

My Fulbright scholarship was based on all the lingering questions I had after writing my thesis and participating in the Edward Gulliano '72 Global Fellowship while at Brown. Combining my loves of glaciology and rural health opened up generative spaces for inquiry around critical topics like climate change, water security, and community resilience.

I worked as a mountain guide in Ecuador for Overland Summers; worked at Harvard University's David Rockefeller Center for Latin American Studies in Santiago, Chile; and was awarded the American Alpine Institute's 'Guido Lika Lur' Scholarship for their Alpine Mountaineering and Technical Leadership program.

I plan to continue attending the fields of medicine, anthropology, and climate science. I plan to apply to medical school in 2023 with future graduate studies in medical anthropology and critical mountain studies.

### Thank you for your longstanding support of Brown and your foresight in providing for the University through a planned gift.

Like you, I am a proud member of the College Hill Society, a select group of alumni and friends who have committed to Brown's future through an estate plan, charitable trust or other planned giving arrangement. Over the years, College Hill Society members have had a transformational impact on campus. Your gifts have created scholarships, enriched academic programs, and strengthened athletics. Your membership in the College Hill Society makes a powerful statement about your belief in Brown's future.

Gifts like yours support the educational experiences of students like the two outstanding alumni whose stories I'm delighted to share now. They will have an impact far beyond College Hill as they pursue their next chapter as Fulbright for our students who, in turn, will secure a brighter future for our world.

Once again, thank you for your commitment and for enriching lives throughout the Brown community.

  
Rashid Zia '21  
Dean of the College



# Demonstrating Impact



*Portrait of Leonilda Gervasi (1934)*  
Artist: Frank Gervasi (1895 - 1986)



# Showing Appreciation



COLLEGE HILL SOCIETY

## Recordings of College Hill Society Virtual Events

▶ How the Brown University Library Strengthens Academic Excellence

▶ The Power of a Charitable Remainder Trust for You *and* Brown

▶ Charitable Gift Annuities: A Win-Win Opportunity

▶ This Land Is Home: Centering Indigenous Voices in K-12 Outreach Education

▶ Staying Connected through Tech

▶ From Covid to Climate Change: A Conversation with Larry Larson

▶ A Conversation on Digital Health with Dr. Megan Ranney

▶ First Readings: Report of the Brown University Steering Committee on Slavery and Justice

# Showing Appreciation



**College Hill Society Luncheon:  
An opportunity to connect and celebrate**

# Showing Appreciation



**CHS Members were entertained by  
The Higher Keys, Brown University's beloved  
all gender a cappella group**





# Recognizing Support



Inspiring Others

# Recognizing Support



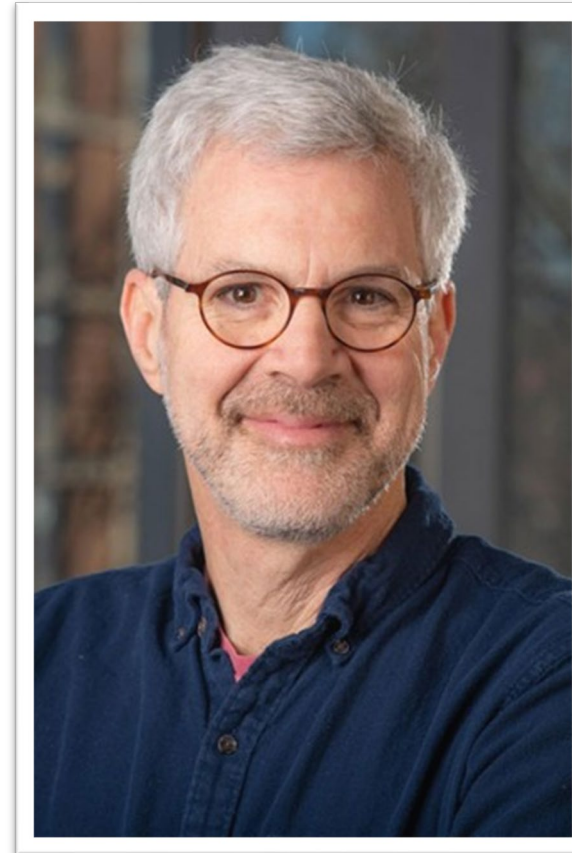
Inspiring Others



# New: Providing Content



Emily Oster is a Professor of Economics at Brown University and the author of *Expecting Better*, *Cribsheet* and *The Family Firm*. She holds a PhD in Economics from Harvard.

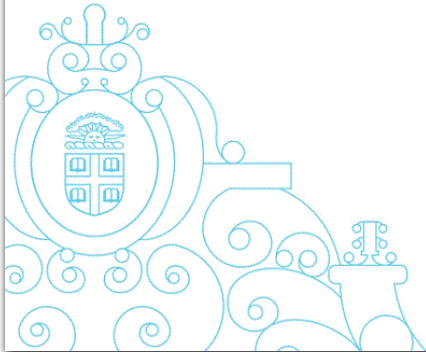


Daniel Weinreich, Ph. D. is a Professor of Biology Department of Ecology and Evolutionary Biology, and Center for Computational Molecular Biology at Brown University. He holds a PhD in Organismal and Evolutionary Biology from Harvard University.



# New: Extending a special welcome

Welcome to the  
**COLLEGE HILL SOCIETY**



## Thank you.

When you chose to make a planned gift to Brown—whether by designating the University in your will or retirement plan, donating a non-traditional asset, or setting up a charitable trust or gift annuity—you affirmed your commitment to the University's mission to serve the community, the nation, and the world. We count you among Brown's most valued donors.

*Because of donors like you, Brown students, alumni, and faculty will continue to discover, communicate, and preserve knowledge and understanding in a spirit of free inquiry.* Your belief in these intellectual endeavors empowers Brown scholars and researchers who are uniquely equipped to make an impact in their communities, society, and world.

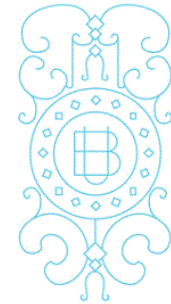
Generations before you have recognized the power of philanthropy at Brown.

**So did you, and for that we are grateful.**

We  
**HONOR**  
*your commitment.*

We  
**CELEBRATE**  
*your impact.*

We  
**WELCOME**  
*you.*



*The*  
**COLLEGE HILL SOCIETY**

Recognizing alumni and friends who provide a future Brown can count on through a planned gift

# New: Extending a special welcome

*“He was ahead  
of his time.”*

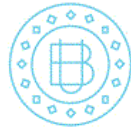
— Mercedes Vaquero,  
Professor of Hispanic Studies

José “Pepe” Amor y Vázquez was professor emeritus of Hispanic Studies at Brown and one of the founders of its Center for Latin American Studies. A preeminent scholar in the field of colonial Latin American Studies, Vázquez generously served as a volunteer adviser, author, editor, translator, and fundraiser for the John Carter Brown Library.

In addition to his longstanding service, *Vázquez left over \$3.5 million in his estate, establishing the José Amor y Vázquez Endowment Fund to underwrite programs and projects at the John Carter Brown Library related to Spanish and Spanish American subjects.* This fund has supported nearly 20 short-term fellowships and purchased numerous important additions to the collection.

*The Legacy  
Continues with  
You*

# New: Extending a special welcome



This piece was developed and produced in the Walter Feldman Book Arts Studio by **Suzi Cozzens** and **Iris Wright '23**.

## A note about Walter Feldman and the Book Arts Studio

Professor Emeritus Walter Feldman ADE'59 hon. (1925 – 2017) was a modernist American painter, printmaker, and mosaicist who spent most of his life and career in Providence, Rhode Island. He graduated from Yale in 1950 with a bachelor of fine arts and in 1951 with a masters of fine arts. After Yale, Feldman came to Brown—where he spent the next five decades teaching and mentoring students.

Feldman's art was shown internationally and received awards from such institutions as the Metropolitan Museum of Art in New York City and Milan's *Mostra Internazionale*. Yet, he did not want his work confined to museums and galleries. His art was also put to use on campus, where he designed everything from a medal for exceptional engineering alumni to a sculptural "Keep Off the Grass" sign at Wriston Quad. For decades before the digital age, he created art to illustrate the course catalog.

In 2008, Feldman made a gift of his Providence residence to support Brown's Book Arts Studio. He and his wife Barbara continued to live in the home until his death. Brown sold the property in 2021, and the proceeds were directed to sustain the Book Arts Studio and "the making of beautiful books" in accordance with his wishes.

The Walter Feldman Book Arts Studio, which was renamed in 2005 in honor of Feldman, is a unique space dedicated to keeping the book arts alive at Brown. There, students learn papermaking, typography, letterpress printing, book design, and bookbinding.

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## A note about the artists

Suzi Cozzens is a Providence-based educator and artist specializing in handmade paper, books, letterpress printing, and assemblage.

Iris Wright '23 (xe/xem/xyr) is a Providence-based multimedia artist.



# But how do you know what to offer?

Easy... just ask!!!



Donor surveys are a goldmine of information and help guarantee success.

When you know what's most important to your donors you can provide them with what they really want.



# Measuring Success

- ❖ Increased Support for Current Use or Other Giving Priorities
- ❖ Growth of Planned Giving Pipeline
- ❖ Deeper Engagement
- ❖ Conversion



# Measuring Success

Most importantly, it's the opportunity to create your own narrative.  
It's YOUR story to tell....





# Let's Discuss!

What's your story?

