Customize this **sample internal briefing document** to reflect your research
on women's philanthropy efforts and to align with your institution's
strategic vision and goals.

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. The approaches involve comprehensive, strategic planning and execution to further
advance development efforts focused on increasing financial as well as other support from
women.

Overview:
Conducted one-on-one interviews with a half dozen university program directors. More than 50
colleges and universities have created programs centered on leadership, philanthropy,
participation, and engagement with their women constituents. Below are the institutions we
interviewed and included brief program highlights and insights on:

{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 – include your own that you've found too}

a. Women hold 51% of 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 327 women billionaires worldwide, as of March 2022. (*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)

Institution Programming
{In this section, include any programming you are already doing for women on or off campus}
For instance:
What has your team done? In the spring of 2017, the Advancement Office successfully planned
and executed **Women at XXX: Moving Philanthropy Forward**, which was an event to
recognize the impact of women on philanthropy through service and charitable giving.
OR Within departments: The School of Communication and in conjunction with the Sport
Management Society, **Women Influencers in Sport (WINS)** offers regular programming to

encourage the development and education of female students studying sport management. Through the initiative and its mentorship, female students gain the skills, knowledge, networks and confidence necessary to establish themselves in what is currently an overwhelmingly male-dominated industry.

OR Volunteer driven such as: The **Women's Entertainment Empire (WEE)** is an alumnae-driven support and networking group for both XXX alumnae working in the entertainment industry and undergraduate students seeking a future career in the entertainment industry in Los Angeles. WEE aims to mentor, support, and accelerate female students and alumnae through informal networking and professional development events.

{Your Institution's Demographics}:

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.
- Among parents, we have 8,201 active women in our database with 5,269 having made a gift in the last year.
- 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, we have identified a handful of themes that have 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 where we are today.
3. Lastly, it's clear that comprehensive plans are not built overnight. {Your Institution} will be wise to take the time to question, reflect, study and analyze data, engage many in conversations both on and off campus, as we create a phased in implementation plan.
4. We should also consider folding pre-existing programs (as noted above) under a larger umbrella that fits into the greater vision of the university.
5. 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