What is the Mount David Society?

The Mount David Society (MDS) is the leadership giving society of the Bates Fund and a premiere giving program for the college. MDS members make annual commitments to Bates of $1,855 or more (or for BOLD Alumni, $100 for each year since their graduation) and their philanthropy is essential to the Bates Fund and critical to our overall fundraising success.

The 2013-2014 fiscal year marks the 10th anniversary of the Mount David Society and throughout this decade there has been tremendous growth in the impact of this leadership giving to the Bates Fund. Since its inaugural year in 2004, annual MDS gifts have increased from $2.2 million to a remarkable $4.9 million last year. During this time, MDS support has grown from 65% of the Bates Fund total to 79% of the Bates Fund last year. At the end of last year, we were proud to count 900 members of the Mount David Society. Our MDS goals for this fiscal year are ambitious: $5.5 Million and 1050 donors, and it is with your help that attaining these goals for Bates are possible.

When promoting membership in the Mount David Society, it is important to highlight the collective impact of this level of giving, that a small number of donors make up such a large portion of our annual fund. It is notable that just over 10% of donors to Bates last year gave at the MDS level, however their support was almost 80% of the Bates Fund overall.

There are two unique giving programs that are part of the Mount David Society. The first is the President’s Associates level, which acknowledges the most generous members of MDS and those that lead the way in our annual philanthropy, making gifts to the Bates Fund of $10,000 or more. These donors receive special recognition for their significant contributions to the college, which include stewardship events and correspondence from President Spencer. Increasing the number of President’s Associates donors is a focus for the college this fiscal year and will be critical the growth of the Bates Fund moving forward. We are utilizing a special matching challenge for new President’s Associates this year as a result and there will be separate talking points for that shared.

The second is the Named Scholars program. Donors who give $5,000 or more to the Bates Fund can create a current-use named scholarship for a deserving Bates student in their name or in the name of a loved one. This gift is used the following academic year to support the college’s financial aid budget through the Bates Fund.

What does the Bates Fund support and why are these gifts important?

Gifts made to the Bates Fund provide significant budget relief and support for the fundamental aspects of a Bates education, everything from faculty salaries and curriculum development to athletic team travel and dance performances. Examples of areas the Bates Fund supports include:

Financial Aid: Nearly half our students receive financial aid, and the average annual aid package is $38,200. Bates meets 100 percent of calculated financial need and has a need-based financial aid budget of about $30.6 million. Need-based grants (gifts) in the current year range from $1,000 to more than $57,000. All financial aid at Bates is awarded on the basis of demonstrated financial need.
Instruction and Research: The Bates Fund helps compensate the 200+ top-in-their-field faculty members, allowing Bates to maintain a 10:1 student to faculty ratio.

Academic Support: The Bates Fund assists in funding for necessary Library staffing, technology, and holdings to support 350,000 Library visits by students, faculty, and guests.

Student Services: The Bates Fund supports increased Career Development Center offerings and events—such as one-on-one counseling, employer information sessions, internships, and workshops on topics ranging from networking to résumé building.

What “counts” towards the Bates Fund and the Mount David Society?

Gifts made to the Bates Fund are unrestricted, current-use gifts to the college, essentially providing support where Bates needs its most towards its operating budget. Bates Fund gifts from the 2013-2014 fiscal year will be used in the following academic year.

A few areas of “restricted” or “targeted” giving included in the Bates Fund are scholarships, faculty support, library services and student life. Also, donations to specific athletics teams or to Friends of Bates Athletics (FBA) are budget additive, used in the year ahead and are recognized as part of the Bates Fund. (For example, if someone makes a gift of $2,000 to the Men’s Soccer team, they will be recognized as part of the Mount David Society for that donation).

Most gifts that restrict how and when they can be used are not included in the Bates Fund. Examples of gifts of this nature are donations made exclusively to endowed funds or capital projects.

Important Highlights and News from Campus (helpful to share in your outreach)

Announcement of the Catalyst Fund

In late October, an $11.5 million gift to the college from current and past members of the Board of Trustees was announced in support of President Spencer’s three main initiatives for the college. This fund is to be used over the next five years above our annual operating budget and shows confidence and trust in President Spencer as our leader and in her vision for the college.

In her remarks at the campus announcement of the Catalyst Fund, President Spencer said that “we have urgency, we have ideas and we have ambition.” This is a wonderful and significant opportunity for the college to draw on these resources as we begin earnest work in developing and enacting plans to support these priorities.

Class of 2017: Admission Success

We are incredibly proud that our first year class is the most geographically, racially and socio-economically diverse ever to enroll at Bates. It is also the most academically distinguished class in recent Bates history. Last year we had a record number of applicants, 5,243 and also a substantive increase in the number of student applying Early Decision, those who apply to Bates as a top choice and agree to enroll if they are admitted. This is a testament to the high interest in Bates among prospective students but also their belief in and attraction to the power of a Bates education.

To provide a sense of the geographic span in the first year class and show the reach of the college through increased recruiting efforts by the Office of Admission: 43% of the Class of 2017 hails from New England, with 47 students coming from the state of Maine, however 14% are from the Southwest and West and 8% from the Midwest and over 7% of these students are International.
Key Leadership Positions Filled

Since President Spencer has taken the helm, she has had the opportunity to lead a number of searches for some key members of her senior staff. We are very proud that these leaders in higher education that have joined the college over the past year.

Sarah Pearson ’75 was named Vice President for College Advancement in August 2013, coming to us from an impressive career in the fundraising and development field at a number of fine institutions including Cornell, Harvard, the University of Chicago and Northwestern University, where she served as their vice president for 8 years.

Matt Auer joined Bates this summer as Vice President for Academic Affairs and Dean of the Faculty. Matt comes to us from Indiana University where he served as Dean of Undergraduate Education but most recently as the Dean of the Hutton Honors College, the liberal arts program within the larger university. He is a leading scholar in the areas of environmental and energy policy, sustainable development and foreign aid.

Crystal Williams has just begun at Bates as Associate Vice President and Chief Diversity Officer, where she will oversee the Office of Equity and Diversity and the Office of Intercultural Education. We welcome Crystal to Bates from Reed College in Oregon, where she served as Dean for Institutional Diversity.

A Leader in Producing Fulbrights

In the Oct. 28 edition of The Chronicle of Higher Education, Bates again was noted as a “top producer” of Fulbright U.S. Student grants, ranking among the top 10 U.S. bachelor’s degree colleges. Bates’ numbers are on the rise, too: 5 student Fulbrights in 2011, 7 in 2012 and 12 in 2013.

Culture of Philanthropy

The college has made great strides in recent years in enhancing our outreach to students about the importance of philanthropy and educating them about the ways in which alumni and parent support affects their Bates experience. We have increased the number of student programs and there are dedicated staff in the Office of College Advancement that work with current students, and this success is most evident in the Class of 2013’s impressive senior gift effort, where they reached a remarkable 92% participation rate.

Now, onto your contacts and conversations….

Your Role and Purpose for the Call

- **Role:** As a MDS Committee member, you are an informed party with insider’s access to the college and have a commitment to leadership-level annual support.

- **Purpose:** You are calling like-minded alumni who are professional leaders to 1) inform them of some of the exciting things happening at the college and 2) explain the value of increased involvement with Bates and membership in the Mount David Society

- **Primary message:** Bates wants to ask for more than money; it wants to create a dialogue with you and bring you closer to the college as a partner. It is looking to establish a more meaningful relationship with alumni and parent leaders where there are tangible benefits on both sides.

- **If you are contacting a prior MDS donor:** Thank them for generously supporting the college at the MDS level last year or in the past and ask if they will consider renewing or increasing their gift this year (refer to the ask amount in the donor’s information).
Ask Open-Ended Questions to Begin a Dialogue

Before delving into the case for the Mount David Society, ask a few open-ended questions to build rapport. Explain that you will pass any feedback you hear back to the college. Some ideas are provided below (please adapt accordingly, as you feel comfortable):

Here and Now
- What have you heard/what do you know about our new president, Clayton Spencer?
- Do you attend Bates events?
- How often do you get to campus?
- Are you in touch with classmates/alums?
- What do you do professionally? Do you know any Bates alumni at your work?

Undergraduate Days and Before
- Why did you apply to Bates?
- What was your hometown before attending Bates?
- How did you find the academic curriculum and coursework at Bates? Was it challenging?
- What was your major and why did you choose it?
- Where did you live on campus?

From Bates to Now
- Did you go to graduate school? Did you feel well prepared?
- Did you feel well prepared for your first jobs?
- When did you meet your spouse/partner? What does he/she do?
- What kind of things do you do outside of work?
- Do you volunteer or serve on any boards?

As You Listen, Share These Points
- Bates has improved as an institution.
  - Under our previous two Presidents, the college has:
    1. Engaged in its first comprehensive facilities master plan that has led to functional new facilities (Pettengill Hall, two new dorms, New Commons, Garcelon Field, athletic facilities, the renovation of the Bill and Hedge Hall as academic buildings)…
    2. Maintained a high commitment to academics through 10:1 student: faculty ratio and a focus on competitive faculty compensation…
    3. Through the Harward Center, become a national leader in community-based learned (service learning) with hundreds of students participating in experiential learning off campus…
    4. Attracted a highly-qualified Board of Trustees encompassing expertise in a variety of areas. The college has a modern and sophisticated management of the endowment.
    5. Strengthened its financial aid budget and increased student diversity dramatically over the past few years.
- In short, Bates provides a superior education in a close-knit community that continues to pull away from the pack in creating the highest caliber citizens who contribute to the world.
- Bates has a challenge in front of it. President Spencer is energized by this and her leadership is ushering in a new era at the college.
  - Bates has lofty aspirations and is developing a vision for the next 10 years that will preserve its heritage yet propel it further forward in a very competitive marketplace.
  - Much of this work will take enhanced and deeper resources and support from the Bates Fund will be essential to this.
Explain How Bates is Tackling These Challenges

- There is incredible energy and momentum at the college RIGHT NOW and we are facing these challenges head on under the leadership of President Spencer. Throughout her first year she met with students, faculty, staff, alumni, parents and community leaders to help shape her understanding and vision for the college moving forward. In recent months, these institutional priorities have been laid out and more clearly articulated as we begin to take action on them:
  - **The Engaged Liberal Arts**: resources to deliver the strongest possible residential liberal arts experience, even as we shape a forward-looking curriculum and hire and support the faculty to teach it.
  - **Purposeful Work**: resources to create new programs to help students understand and explore their relationship to work, because the capacity to seek, find, and engage in purposeful work lies at the heart of our liberal arts mission.
  - **Excellence and Opportunity**: resources to finance our commitment to attracting and enrolling the very best students and creating the most vibrant and effective learning community possible.

- And beginning with our Board of Trustees, the college is doing a number of key things:
  1. Providing critical people resources to improve the job marketing for students, dialogue with alumni, and strengthen its reputation and stature. A growing and professional Advancement department; Career Development Center; and Marketing and Communications effort.
  2. Focusing in on the key alumni community for giving and thought leadership in a dialogue fashion.
  3. Changing our dialogue culture from closed “don't ask” (for money), “don't tell” (about the endowment) to one of transparency and partnership. This dialogue ensures students and alumni understand the relevancy of Bates today.

- Membership in the Mount David Society provides valuable benefits for donors:
  - **Information / access** – More direct insight and access to college events and leaders.
  - **Meaningful networking**. The potential and importance of making connections is all around us in our post-Bates lives. How we will do this is still evolving. Some of it will surround the communication tools below:
    1. **Face to face**: MDS networking dinners and recognition events where members meet to talk and learn from one another and have opportunities to connect with senior administrators at the college.
    2. **In print**: Sending donors “MDS Leadership Notes,” a quarterly newsletter from the Chair of the Board of Trustees informing them of high-level campus discussions and plans, philanthropic activity and insider insight about academic, admissions, athletics and student programming.
    3. **Online**: a new “LinkedIn” private group just for MDS donors provides real time information about the college and serves as another tool for high-level networking activity.
  - **Recognition** – overt praise of Bates’ major donor community
    1. **Inside the campus wall**: from exclusive programs on campus to book plates in the Library.
    2. **Outside the campus walls**: Annual Report of Giving sent college-community wide showing the pride of this MDS community and their significant impact.
Close By Asking Them to Get More Involved

- The Co-chairs of the Mount David Society and my fellow committee members are reaching out to potential alumni leaders to inform them of these exciting developments and explain how they can help make a difference.
- With the arrival of President Clayton Spencer last year, Bates is poised to take its educational excellence to the next level. Leadership support from MDS donors such as you helps the college advance and make these opportunities possible.
- We hope you will do three things:
  - Consider making the college a top priority in your long-range philanthropic planning.
  - Consider joining the MDS this year, and if that is not possible, keep it in your sights for future years. The MDS dollars provide you the benefits above, but they also provide the college critical immediately expendable financial resources through the Bates Fund. Like all colleges, the Bates Fund and endowment work hand in hand to provide operating budget support. The college is focused on growing both.
  - Get involved by volunteering through the Career Development Center or Admissions, attending Bates events, checking the website and social media pages, and connecting with classmates and other Bates peers while you consider a gift.
- We are essentially asking people to consider giving their time, talent and treasure to Bates in a way that is most meaningful for them. Share why you support the college at this leadership level and why it is important to you. Asking peers to join you as part of MDS has an incredible effect.
- In the changing landscape of higher education and the world, institutions like Bates are increasingly important. Helping to support our outstanding liberal arts education and mission-driven approach to educating the whole person if critical at this time in the life of the college.
- Thank them and offer again to pass along any feedback they have about their relationship with Bates.