



Brandeis National Committee

Strategic Plan 2007 – 2008

May 2008



Who was involved?

- **Steering Committee**
 - 10 volunteers and 2 University appointees
 - Co-Chairs
 - Dottie Pierce, National President, BUNWC
 - Michael Whelan, Vice Provost for Academic Affairs
- **Subcommittees: 26 volunteers across country**
- **National Center professional staff**
- **University: senior officers**



Strategic Planning themes

- University appreciation for BUNWC
- New name: Brandeis National Committee
- New mission statement affirms philanthropic culture
- Shared governance with University
- BNC has vital fundraising role in supporting University
- Membership is our vital resource
- Organizational structure is sound
- Learning Opportunities: Brandeis is a foundation for excellence

Note: many changes go into effect beginning July 1, 2008 (FY '09)



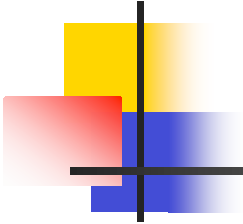
Mission Statement

Brandeis National Committee is dedicated to providing philanthropic support to Brandeis University, a distinguished liberal arts and research university founded by the American Jewish community. Its membership is connected to the University through fundraising and through activities that reflect the values on which the University was founded: academic excellence, social justice, non-sectarianism and service to the community.



Programming: enhanced learning opportunities

- Expanded University contact with chapters and regions
- Increased visits by Brandeis faculty, students, and development staff
- New programming:
 - Study Groups
 - 'deis flicks
 - Brandeis Encore Series
 - Elderquest/Ourselves Through the Mirror of Film & Literature
- More chapter contact through co-sponsored events with Alumni Association



Membership Dues



Membership changes

- Dues have increased to \$60
- New levels of membership with attendant benefits
 - Gold: \$ 85
 - 10% discount at Brandeis University bookstore
 - 10% discount on Avis Rent-a-Car
 - 35% discount on books from the Brandeis University press
 - Brandeis *Catalyst* magazine
 - Platinum: \$125
 - All above benefits plus:
 - Preferred seating at chapter events (at chapter's discretion)
 - Early registration for select programs (at chapter's discretion)
 - Commemorative book about Supreme Court Justice Brandeis



Why a dues increase?

- Annual dues should cover our operating expenses; they do not
- Cost of doing business has increased
 - for organization of 40,000, 76 chapters, 15 states
 - for example: printing, postage, communication, programming, and training
- Policy of having “life memberships” has not covered rising costs for more than 25 years
- Only 4 dues increases in 31 years
- Last dues increase was in 2002



Steps taken to reduce costs in the National Center

- Reduction in professional staff
 - In last 3 years, staff reduced from 15 to 9
- Level operating expenses for FY '09
- Savings through integration within the University
 - Accounting, publications, fundraising



Closing the gap

- Projected FY '09 budget takes significant steps to cover expenses with dues
- Variables in projected budget include # of members and membership levels selected
- The actual FY '09 results may well see the gap closed
- No further large scale increase in dues anticipated in near future

BNC Strategic Plan 2007-2008

FY09 Projected Budget

National		
Projected Revenues		
Membership Dues		960,000 *
Projected Expenses		
National Service to members	261,950	
National Fundraising	42,000	
National General Administration	746,440	
Total Projected Expenses		1,050,390 **
Net National Activity		(90,390)

Direct to University Gifts		
Donations	900,000	
Planned Gifts	200,000	
Bequests	200,000	
Total Direct to University Gifts		1,300,000 ***

Chapter		
Projected Revenues	2,950,000	
Projected Expenses	2,300,000	
Net Chapter Activities for Library Operations		650,000

* Variables include number of annual members and membership levels selected. This number represents 16,000 members @ \$60 each and does not include gold and platinum levels.

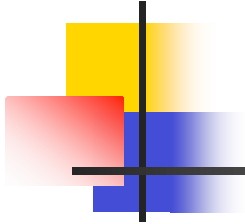
** Does not include university administration expense

*** Direct to University gifts vary from year to year and cannot be used for operating expenses



Strategic Plan Steering Committee

Please do not hesitate to contact the Strategic Plan Steering Committee. If you have questions about this presentation or the plan, contact the following Committee members.



Strategic Plan Steering Committee

Co-Chairs

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BUNWC representatives

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Strategic Plan Steering Committee

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