

# Giving Guide

Empowering Future Leaders  
to Make a Difference



*Saybrook*  
UNIVERSITY



# History

For more than 50 years, Saybrook University has helped thousands of students unlock their full potential to make a meaningful impact in the world.

Saybrook University was founded in 1971 with deep roots in the humanistic paradigm, informing our entire approach to education. For the 50 years since, Saybrook has helped thousands of students unlock their full potential.

The Saybrook community is based in Pasadena, California, and extends far beyond with a global network of scholars and leaders united in working toward a humane and sustainable world. Our graduates learn to understand the interconnectivity of various systems and how to make significant change, finding success in a variety of fields including business, nonprofit, and private practice.

Join us today in our steadfast mission: to relentlessly pursue a socially just and sustainable world by educating humanistic leaders to transform their fields and communities.

# Message From the President



On behalf of our faculty, staff, administration, and students, I want to personally thank you for taking time to consider a gift to Saybrook University.

Focused on advancing the health and well-being of the communities we serve, we believe transformation is possible. Donors like yourself help make our mission and vision a reality.

Thanks to you, the impact of our community is multiplied hundredfold. I hope as you read our giving guide, you will find yourself inspired—just as my wife, Kim, and I were when making our donation. Your gift will make a true difference in creating a more just, humane, and sustainable world.

A handwritten signature in black ink that reads "Nathan Long". The signature is fluid and cursive, with the first name "Nathan" written in a more stylized, connected script and the last name "Long" in a slightly more formal cursive.

Nathan Long, Ed.D.  
President

# Board of Trustees



**Chair**

Patricia Breen, Ph.D.



**Vice-Chair**

Troy Roland, Ed.D.,  
MBA, M.S.



**Ex Officio**

Michael Horowitz, Ph.D.



**Ex Officio**

Nathan Long, Ed.D.



**Trustee**

Gloria Chance,  
Ph.D.



**Trustee**

Jennifer Groh,  
Ph.D.



**Trustee**

Cherron Hoppes,  
Ed.D.



**Trustee**

Carolyn Mathis,  
MBA, SHRM-CP, PHR



**Trustee**

Angelina Salazar,  
M.A.



**Trustee**

Daniel Sieberg,  
M.J., BFA



**Trustee**

Joanne Smikle, Ph.D.



**Trustee**

James Theiring, CPA



**Trustee**

Diane Watson, MBA

# Institutional Advancement Leadership



**Carmen Bowen, MBA**

Assistant Vice President for  
Institutional Advancement  
Cbowen@saybrook.edu



**Mark Murphy, M.A.**

Director of Institutional Advancement  
Mmurphy5@saybrook.edu

# Why Donate?



## Empower Saybrook's Mission

Our capacity to grow, make an impact, and implement our mission is enhanced through donations from generous supporters.



## Support Student Scholarships

Saybrook is committed to helping students find ways to invest in themselves and their futures. We offer multiple scholarship opportunities to help students achieve their goals and enrich their lives.



## Further Departmental Research

The ability of Saybrook faculty members to conduct world-class academic research and development in their fields of study is backed with funding and support.



## Contribute to Academic Innovation and Program Development

Your support helps ensure that the programs we offer best serve the needs of the students—empowering their ability to make positive change in the world.



## Build a Lasting Legacy at Saybrook

Create a long-lasting reminder of your commitment to Saybrook and become an integral part of our historic and innovative humanistic legacy. We have several naming opportunities to select from, including naming departments, chairs, and rooms at our Pasadena campus.

# Ways to Give

## Cash Gifts

Restricted and unrestricted cash gifts are accepted via credit card, check, PayPal, or a pledge.

## Matching Gifts

Check with your organization and find out if they will match any gift you make to Saybrook. Organizations may have varying match ratios. This is a great way to support Saybrook above and beyond your annual contributions.

## Student Scholarships

We are fortunate to have many scholarship opportunities to help students achieve their educational goals. Your gift can be directly applied to a specific scholarship program. Learn about available scholarships:



## In-Kind Donations

We gratefully accept “in-kind” gifts of goods and individual or corporate services (such as advertising, printing, items for events, etc.). In-kind gifts are valued by the donor, and while Saybrook will not value non-cash gifts, we will provide the donor with a written acknowledgment of the specific goods/services received.

## Endowed Gifts

We accept endowed gifts, which are permanent, self-sustaining sources of funding. Endowment assets are invested, and each year a portion of the value of the fund is paid out to support the fund’s purpose. Any earnings in excess of this distribution are used to build the fund’s market value.

## Event Sponsorships

We offer several sponsorship opportunities for events throughout the year, including the Annual Scholarship Awards Gala, Mind-Body Wellness Fair, and the Film, Book and Poetry Festival, among other events. Benefits include significant marketing exposure for your organization and business. Contact our events team to learn more about events at Saybrook:



## Planned Gifts and Bequests

Planned gifts help support our unique programs. A bequest to Saybrook can be made for a specific amount, for a percentage of your estate, or for all or a portion of what is left after you have made bequests to your family. To make a gift to Saybrook from your estate, you must sign a new will or living trust instrument, add a codicil to your present will, or make an amendment to your present trust instrument. Alternatively, you can designate Saybrook as a beneficiary of a retirement plan or life insurance policy. To do so, contact the retirement plan administrator or life insurance company and complete the appropriate beneficiary designation form.



# Additional Considerations

## Securities

Contributions of readily marketable securities may generally be accepted by Saybrook, and the committee shall consider whether such securities shall be sold immediately upon receipt. The committee shall consult its investment advisers in making such a determination, but it is generally not Saybrook's policy to hold donated securities for an extended period of time. Generally, contributions of non-readily marketable securities are disfavored. Additionally, securities which are assessable, or could otherwise create liability for Saybrook, are disfavored. Such gifts are credited to donors according to current IRS regulations but are not valued by Saybrook.

## Life Insurance

Only fully paid insurance policies for which Saybrook is named as the beneficiary and the irrevocable owner of the policy will be accepted. The gift is generally valued at its interpolated terminal reserve value, or cash surrender value, upon receipt. If the donor contributes future premium payments, Saybrook may include the entire amount of the additional premium payment as a gift in the year that it is made. Particularly if the donor does not elect to continue to make gifts to cover premium payments on the life insurance policy, Saybrook may choose to convert the policy to paid-up insurance or surrender the policy for its current cash value.

## Real Estate or Real Property

No gift of real estate may be accepted if such acceptance causes Saybrook to incur a financial burden, potential liability, or other obligations, unless otherwise approved by the committee. In this regard, the donor will generally bear the expenses related to and required to evaluate and make a gift of real estate. In evaluating whether to approve a gift, the committee will consider, among other things:

- The property's location and present use.
- The property's value as established by an independent qualified appraiser.
- Whether the property has been for sale, and if so, for how long and at what asking price.
- The property's zoning, and the potential use(s) of the property and any improvements thereon.
- Whether the property will be retained and utilized, or whether it will be offered for sale. To the extent that the property will be offered for sale, the listing price, terms of sale, and time period anticipated for the sale should be considered.
- The amount of the holding costs associated with the property (e.g., property taxes, fix-up, repair, and maintenance costs, insurance, etc.).
- Whether the property is burdened by debt. If the property is burdened by debt, a written agreement with the donor should be entered into which provides for indemnity in the event that the property sells for less than the amount of the debt.
- Whether one or more phases of environmental investigation should be pursued.
- Whether the property is subject to specific local, state, or other governmental regulation.
- In the case of properties which may be viewed as "risky," whether a separate entity should be formed to take title to the property in an attempt to insulate Saybrook from liability.



**“After exploring Saybrook, I immediately knew this was my next step. And when I was awarded the Presidential Scholarship, I was given the financial freedom to make attending Saybrook possible. These scholarships can determine if someone can take their next step. They are critical for making education more accessible to all!”**

**– Jonathan “Max”**

**Van Gelder, Ph.D. student,  
Transformative Social Change**

- In the case of properties that have businesses accompanying them, whether Saybrook will experience unrelated business taxable income (UBTI) as a result of the operation of the business.
- In the case of properties that are subject to debt, whether unrelated debt financed income is an issue.
- Whether title insurance in an amount equal to the contribution should be obtained.
- Whether the property can provide a mission-relevant function such as additional space for program delivery, and if not, the property will generally be divested.
- In the case of a remainder interest in real estate, whether someone will occupy the real property for the duration of the stated life, and whether all expenses associated therewith are paid for by the donor or primary beneficiary.

## **Tangible Personal Property**

Saybrook may accept gifts of tangible personal property where it is determined that either (i) the cost to convert the property to cash exceeds the value of the property, or (ii) the property may be used in furtherance of the institution’s mission or programs. Unless contributions of these types of assets further the institution’s charitable purposes, such contributions will generally only be accepted if the means of disposing such property is known and agreed upon prior to acceptance. Because these types of properties often have highly speculative values, are difficult to protect and manage, and difficult to dispose of, such contributions would generally be viewed unfavorably.

## **IRA Contributions: Retirement Plan Beneficiary Designations**

Donors may generally name Saybrook as a primary or secondary (“contingent”) beneficiary of an IRA or other retirement arrangement. As with all gifts, Saybrook will urge prospective donors to seek the assistance of personal legal and financial advisers, including regarding the resulting tax and estate planning consequences.



## Naming Gifts Guidelines

For schools and colleges (at a minimum) determinations of minimum funding requirements will be influenced by a review of naming gifts made in the last three to five years for schools and colleges of comparable size and stature at other universities and by the operating budget and strategic objectives of Saybrook. An endowment for a department chair may be established when \$2,000,000 or more has been placed in an endowment that provides (in perpetuity) the annual funds needed for support. Alternatively, an endowment for a department chair also may be established if a minimum of \$200,000 per year of expendable funds is made available for at least 10 years.

An endowment for a professorship may be established when the combination of salary and endowment is sufficient to cover the salary and related employment benefits for the recipient, staff support, travel, and other reasonable expenses related to the professor's work. Professorships require a minimum of \$1,000,000 in a permanent endowment or a minimum of \$100,000 per year of expendable funds for at least 10 years.

Other considerations often associated with naming gifts include:

- Contributions for naming gifts may or may not be endowed.
- Deferred or planned gifts may not be used to directly fund capital projects unless specifically noted in the approval process
- Contributions and/or pledges may be used to fully or partially fund naming gifts.
- Deferred or planned gifts may be used in combination with current contributions or a pledge to partially fund a naming opportunity provided that such amounts do not exceed 50% of the total gift and the net present value of the entire gift is satisfactory to Saybrook.
- Irrevocable deferred or planned gifts may be used to fully fund a naming gift opportunity so long as the net present value of the entire gift is satisfactory to Saybrook.
- In unusual circumstances determined by Saybrook in its sole discretion, renaming and/or revocation of a named gift may occur upon the recommendation of the committee and approval by the board. Examples of such circumstances may include the donor's default under a gift agreement or the existence of significant legal or regulatory proceedings involving the donor (or a closely identified affiliated business entity or person). Likewise, the board may consider other facts and circumstances that it believes are relevant in determining whether such person will be brought into public disrepute or contempt, including whether such person may have engaged in conduct that may tend to shock or offend the community or public morals.

### Donation of Cryptocurrency

If you are interested in donating cryptocurrency (i.e. bitcoin, etc.), please contact **Carmen Bowen, AVP for Institutional Advancement** at [cbowen@saybrook.edu](mailto:cbowen@saybrook.edu) for additional information.



**“Being awarded this scholarship was an amazing feeling! I am passionate about my research, and to be recognized in this way is an added push to keep going.”**

**-Taylor Williams-Capozziello,  
Ph.D., APH graduate**

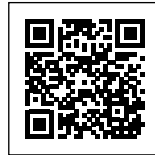
## Oil, Gas, and Mineral Interests

The committee will generally consider the same factors as described above with respect to real estate when considering gifts of mineral interests. The committee will consider that mineral interests may be even more difficult to manage and value than contributions of real estate and may create exposure to unrelated business income (“UBI”) issues.

Further, especially in the case of mineral interests which are “cost-bearing” (e.g., working interests), there is potential for substantial operating costs/losses. Additionally, plugging and abandonment costs can be high, and pollution liability can be significant. Generally, mineral interests will be sold as soon as practical following receipt unless the income generated from holding such interests is deemed sufficient to justify holding them.

## Employee Payroll Deductions

For faculty and staff who wish to contribute to our mission, we encourage them to do so using our employee payroll deduction option. Scan the code below to sign up today.



Your gift goes a long way at **Saybrook!**

## Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the organization's most recent financial statements.
- To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgment and recognition.
- To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
- To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- To feel free to ask questions when donating and to receive prompt, truthful, and forthright answers.



**Where to Give**

[Saybrook.edu/giving](https://saybrook.edu/giving)



**How to Contact the  
Institutional Advancement Team**

[SayAdvancement@saybrook.edu](mailto:SayAdvancement@saybrook.edu)

