

# AAUW CA Fund Peer Group

September 30, 2025

## The Nuts and Bolts of The AAUW Fund



# AAUW CA Fund Committee

**Chair: Deanna Arthur, AAUW CA Director, Alhambra-San Gabriel,  
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## **Committee Members:**

- ❖ **Tobi Balma, Long Beach, La Palma-Cerritos, Greater Whittier, CA Online  
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# What We Will Cover

- **What is the AAUW Fund?**
- **Your Responsibilities**
- **Unrestricted Funds**
- **Restricted Funds**
- **Ways to Contribute**
- **5 Star Program**
- **Requesting a Fellow**
- **Fund Donation Form**
- **Fellowships and Grants**
- **Resources**
- **Questions**

# What is the AAUW Fund?

- It is the umbrella that supports all of National AAUW's programs and initiatives.
- It is the part of AAUW that helps keep AAUW running to be able to fulfill its Mission and Vision.
- It includes Fellowship and Grant Endowments and much more.
- The AAUW Fund remains the largest source of funding exclusively for graduate women.
- Fiscal Year 2024 = \$6.2 Million/276 Fellows & Community Organizations.
- AAUW CA members and branches generously donated \$475,275 to AAUW Fund in 2024.
- Contributions to the AAUW Fund are tax deductible.

# Your Responsibilities to Your Branch

- Be knowledgeable of the AAUW national fundraising policies and ensure the branch complies with AAUW national policies and IRS regulations.
- Be knowledgeable about AAUW programs to promote fundraising efforts to meet goals.
- Honor donor intent.
- Inspire members to underwrite AAUW and its programs through AAUW Greatest Needs Fund (9110), Defend Higher Education Fund (4513), Public Policy Fund (4337), as well as other chosen funds.



# Your Responsibilities to Your Branch

- Ensure member donations are submitted in a timely manner.
- Work with other branch officers and committees to integrate fundraising with other priorities.
- Participate in AAUW fundraising training such as webinar/workshops or opportunities provided by others.
- Celebrate successful fundraising and its impact by thanking and recognizing donors through branch publications, at branch meetings and personal thank-you notes.



# Your Responsibilities to AAUW National

- Be familiar with and adhere to all AAUW fundraising policies, AAUW Bylaws, and IRS regulations.
- Help members understand the vital relationship between AAUW programs and donor funding.
- Dialogue with AAUW about concerns or questions raised related to fundraising efforts or disbursement.
- Submit donations in a timely manner via the AAUW Contribution Report Form.
- Share successful fundraising ideas.
- Lead by example, be an AAUW Fund donor.

# Your Responsibilities to AAUW CA

- Review and retain AAUW monthly branch donation disbursement reports and report any discrepancies to the state AAUW Fund Chair.
- Celebrate successful fundraising and its impact.
- Share successful fundraising ideas.





# Restricted vs Unrestricted Funds

**Restricted: (96% of assets)  
can only be used for the specific fund purpose**

**VS**

**Unrestricted Funds: (4% of assets)  
are used wherever there is a need**



# Unrestricted Donations

## #9110-The Greatest Needs Fund

- ❑ **Vital source** of **unrestricted support**
- ❑ Allows AAUW to **respond quickly and efficiently** to **emerging challenges and opportunities**.
- ❑ Enables AAUW to **sustain core operations, advocacy efforts, & program expansion** and some **critical operations** like **administrative costs**.
- ❑ **Supports initiatives** like **economic empowerment** programs, **voter engagement** campaigns & **policy advocacy**.
- ❑ Allows AAUW to **adapt to evolving needs** and continue leading the **fight for gender equity**.
- ❑ Crucial to **keeping AAUW agile**, provide **long-term sustainability**
- ❑ Empowers the organization to **drive meaningful change**.

# Preferred Restricted Funds

## 4513 – The Defend Higher Education Fund

- Enables AAUW to elevate the critical higher education issues impacting women.
- Mobilizes advocates across the country.
- Provides strategic resources to students, staff and faculty on campus.
- Fuels investments in the infrastructure & technology necessary to move our mission forward.

## 4337 – The Public Policy Fund

- Increases the impact of our Action Network through growing the number of advocates across the country.
- Provides timely, accurate, & actionable information about our key issues.
- Equips branches with customized talking points on core policy issues like Title IX, student debt and pay equity.



# Popular Restricted Fund

## #3999 Legal Advocacy Fund

Applications Open August 1      Application Deadline September 30

- ❖ **Funds cases in state or federal court** that address sex discrimination in employment or education **and** have the **potential to set or reinforce precedent** for future cases on gender discrimination. (Pay Inequity, Violations of Title IX, Title VII of the Civil Rights Act of 1964, & Tenure Violations).
- ❖ Provides **renewable grants** (\$5K-\$20K).
- ❖ Current and Former **Litigant information** is on the **AAUW Website**.
- ❖ Provides **Clinic Grant Awards to Law Schools** for outstanding clinical programs.

# Some Ways to Contribute

1. Use the Donate Link on the AAUW Webpage
2. Fundraise through your branch
3. Tax Benefit by giving through your IRA Required Minimum Distribution
4. Legacy Circle: Planned Giving - Leave a Legacy (Will, Estate, Revocable Living Trust, Retirement/Life Insurance Policy Beneficiary; Real Estate, various other types of trusts & annuities)
6. Contact the AAUW National Office for Funds not listed on the AAUW Donate Page (for an express link or to mail a check).

# THE AAUW PROGRAM

## ADVANCEMENT CATEGORY (Fund Criteria)

- Raise **\$30** per member in **FY26** towards the **Greatest Needs Fund**
- **Increase** contributions to the **Greatest Needs Fund** by **15%** from the last fiscal year
- **Increase** the number of **individual donors** compared to the previous fiscal year
- Make a **branch contribution** to the **Defend Higher Education or Public Policy Funds**
- **Recruit** at least one **Legacy Circle member** from your branch in FY26

**NOTE:** National calculates the Advancement Requirements and sends branches a snapshot in January to show where branches are to give them time to complete the Star.

# Fellowships and Grants

<https://www.aauw.org/resources/programs/fellowships-grants/>

Applications Open August 1    Application Deadline October 7

## For Individuals

- American Dissertation Fellowship (\$25,000)
- American Short-Term Research Publication Grant (\$8,000)
- American Postdoctoral Research Leave Fellowship (\$50,000)
- Career Development Grant (\$8,000)
- International Fellowship (Master's and Doctorate Degrees) (\$20-\$25,000)
- International Project Grant (\$15,000)
- International Postdoctoral Research Fellowship (\$50,000)
- Selected Professions Fellowship (\$20,000)

## For Organizations

- AAUW Branch and State Affiliate Community Action Grants (up to \$10K)
- Community Action Grant (up to \$75K)



# AAUW Contribution Report Form (CRF)

Send mail to: AAUW P.O. Box 98045, Washington, DC 20090-8045

☐ [connect@aauw.org](mailto:connect@aauw.org)

☐ [800.326.2289](tel:800.326.2289), M-F, 10-5pm, ET

## Required

<b>Officer Name:</b>	<b>Branch Code:</b>
<b>Officer Address:</b>	<b>Date:</b>
<b>Phone:</b>	<b>E-mail:</b>

## AAUW Fund Contribution Instructions and Form

<https://www.aauw.org/resources/member/contribution-report-form/>

**PLEASE PRINT CLEARLY OR TYPE INTO THE FORM - PROVIDE COMPLETE NAME AND ADDRESS – REMIT PAYMENTS AND FORMS TOGETHER**

Please make gifts payable to: **AAUW** for tax-deductible contributions. Contributions should be submitted within 30 days of receipt.

<b>MEMBER/DONOR ID#</b> Member IDs can be found in the <a href="#">Community Hub</a> on the Export Branch Roster.	<b>Donor</b> Enter complete name and address of individual, branch, state, or business. Include business contact if applicable.	<b>Branch/State Credit</b> Your primary branch and state receives credit for your gift automatically. To credit elsewhere please specify below.  Write STATE CONTRIBUTION if to be credited to state only.	<b>Fund #</b> Enter fund# from the second page of this form. Unspecified gifts will go to the Greatest Needs Fund.	<b>Amount \$</b> Must match the donor's or branch's check/card amount. Verify that total gifts match report total.	<b>Notes</b> List memorial information, credit card numbers, with type, and expiration date here if paying by credit card.
<b>Member ID</b> <a href="#">#1234567</a> <b>Ck#8910</b>	<b>Jane Doe</b> 1234 Nowhere St., City, State, ZIP	<b>ABC Branch</b>	<b>9110</b>	<b>\$50</b>	<b>In memory of Jane Doe.</b>



# Request an AAUW Fund Speaker

<https://www.aauw.org/requestfundspeaker/>

- **Instructions are on the AAUW-CA Website**
- Branches are limited to **one visit** from a current fellow **every other year**.
- A minimum of **\$100 honorarium** must be given and **mileage reimbursed** at the current AAUW California rate of \$0.655/mile.
- **You must work with our AAUW California Scheduler** by using this link:  
[https://docs.google.com/forms/d/e/1FAIpQLSeCG\\_qfu91IMTv2kSrpMrJszmCdq9n3lMWDtJMqmAoPSFdQZQ/viewform](https://docs.google.com/forms/d/e/1FAIpQLSeCG_qfu91IMTv2kSrpMrJszmCdq9n3lMWDtJMqmAoPSFdQZQ/viewform)
- **Current fellows are heavily involved** in their studies and very busy.
- The schedulers generally require **four to six weeks of advance notice** to schedule a speaker.
- The schedulers contact **current fellows, but on occasion may call on past fellows** who are often more readily available, and can also speak to the longer-term impact an award has had on their lives.
- **We suggest that you prepare a backup program should a fellow not be available on the dates you request.**

# Resources

## [5 Star Program](#)

[AAUW CA Fund Webpage](#)

[AAUW CA Fundraising Guidelines](#)

[AAUW CA Peer Group Webpage](#)

[AAUW CA Request a Speaker Link](#)

[AAUW Fund Donation Form](#)

[AAUW Fund Donation Webpage](#)

[AAUW Legal Advocacy Fund](#)

[AAUW National Fellowships and Grants](#)

[Branch Job Description](#)

## [Current and Past LAF Cases](#)

[Fellowship Directory 2004-5 thru 2023](#)

[\(by name of recipient\)](#)

[Fellowship Directory 2023 to present](#)

[Greatest Needs Flyer](#)

[Legacy Circle \(CA Webpage\)](#)

[Legacy Circle Brochure](#)

[Named Gift Honoree Info](#)

[National AAUW Fundraising Policies](#)

[Planned Giving](#)

**For Information About the Recipients of Your Branch Endowment/Grant:**

**Contact: Tobi Balma, AAUW CA Fund Committee Member**

[aauw.tobi@gmail.com](mailto:aauw.tobi@gmail.com)

# Questions



# Next Steps

Future Topics of Interest?

## Save the Dates!

**Register on the AAUW CA Calendar for  
Upcoming AAUW Fund Peer Group Meetings  
October 28, 2025; November 18, 2025;  
March 10, 2026, and April 28, 2026.**

**These meetings will also be held on Tuesdays at 7 pm.**

# Thank You!

