



**OXY** Occidental  
College

# Oxy Fund Volunteer Handbook 2024-2025



## TABLE OF CONTENTS

<a href="#"><u>Welcome</u></a> .....	3
<a href="#"><u>Volunteer Expectations</u></a> .....	4
<a href="#"><u>Oxy Fund Committees</u></a> .....	5
<a href="#"><u>What is the Oxy Fund?</u></a> .....	6
<a href="#"><u>Volunteer Resources</u></a> .....	7
<a href="#"><u>Making a Case for Giving</u></a> .....	8
<a href="#"><u>Asking for Gifts</u></a> .....	11
<a href="#"><u>Navigating the Conversation</u></a> .....	12
<a href="#"><u>Addressing Hesitations and Concerns</u></a> .....	13
<a href="#"><u>Ways to Give</u></a> .....	14
<a href="#"><u>Donor Recognition Societies</u></a> .....	16
<a href="#"><u>Oxy Fund Staff Directory</u></a> .....	18

## WELCOME

*“The ability for our students to apply what they’re learning to issues in Los Angeles — one of the nation’s most dynamic and important cities — is a huge opportunity to show the world the value of a liberal arts education.”* Dr. Tom Stritikus, Occidental College’s 17th president

Dear Oxy Fund Volunteer,

It is with great excitement that we begin the 2024-2025 academic year welcoming our new President, Dr. Tom Stritikus! With more than three decades of higher education leadership experience and an abiding commitment to excellence and equity, President Stritikus is uniquely qualified to lead Occidental and bring to fruition [The Occidental Promise](#), the College’s integrated strategic plan. This plan, which will guide Occidental through 2030, focuses on providing students with a distinctive urban liberal arts experience grounded in the values of academic excellence, equity and justice, and immersive student learning in Los Angeles.

An education like the one outlined in The Occidental Promise is reliant on philanthropy. Oxy would not be the institution it is today, or aspires to be in the near future, without the ongoing support of its alumni, parents, friends, staff, faculty and students. Oxy Fund volunteers, through their engagement with our vibrant community, play a pivotal role in helping make this bold vision a reality.

Whether you are a new or returning Oxy Fund volunteer, please know how deeply we value your partnership. The time, energy and skills you impart to Oxy have a profound impact on the College and our student body. Your involvement is essential to our success in realizing The Occidental Promise.


Fundraising for Oxy provides you with the opportunity to become more connected to the College, other alumni, classmates and parents. We want to make sure you have the resources to speak confidently about what is happening on campus today and to respond to questions about why giving to the Oxy Fund is so important to the student experience. It is for these reasons that we created this volunteer handbook, which provides an overview of the principles and strategies that guide Oxy’s philanthropic efforts. We consider it to be a living document that will grow and develop with your valuable input.

We want you to feel supported in everything you do for the College and the Oxy Fund. So please let us know if you have any questions or suggestions on how we can make your volunteer experience better! This truly is a team effort. We could not achieve our goals without each and every one of you.

Most sincerely,



Lara Nassar '12  
Director of the Oxy Fund

Thank You! 

## VOLUNTEER EXPECTATIONS

Giving is not just about finances — the time given by our dedicated volunteers is equally valuable. Occidental's dynamic network of volunteers empowers alumni and parents from around the world to give their time, share their resources, and lend their talents in support of Oxy's mission. Whether connecting with a classmate during a reunion celebration or engaging in any number of ways to enhance the student experience, our volunteers make meaningful and lasting contributions on behalf of the College. Volunteers are expected to:

**Lead** by example. Make your own annual gift.

**Attend** Oxy's alumni and parent events and invite your assigned classmates or parents to also attend. Tune into volunteer training events and conference calls.

**Contact** classmates or parents and encourage them to give to Oxy and connect with the College.

**Share** Oxy news and updates with your fellow alumni and Oxy parents.

**Relay** alumni and parent feedback back to Oxy Fund staff.

**Thank** your classmates and fellow parents! Every gift deserves a personal acknowledgement.

### Volunteer Forms

Every individual who volunteers for Oxy is required to read and sign Oxy's Volunteer Agreement, Volunteer Confidentiality Agreement and Volunteer Code of Conduct prior to starting in their volunteer role. These three forms must be submitted annually, following Oxy's fiscal year calendar (July 1 - June 30).

To access and complete these online forms, please visit [Institutional Advancement Volunteer Resources](#).



## OXY FUND COMMITTEES

### [GOLD \(Graduates of the Last Decade\) Committee](#)

The GOLD Committee is Occidental's young alumni engagement and fundraising body, composed of graduates of the last decade (GOLD) from around the country who have a strong passion and affinity for Occidental College. As ambassadors of the College, members develop relationships with fellow young alumni to deepen their engagement with Oxy and encourage philanthropic contributions. The committee assists in planning and facilitating events geared towards young alumni. GOLD Committee members lead by example by making their own leadership gift to Oxy, and by raising awareness about how alumni support impacts the current student experience. [Learn more](#) about GOLD Committee roles and responsibilities.

### [Parents Council](#)

The Parents Council (PC) is the principal parent fundraising body for Oxy Fund support. Comprised of current parents and parents of alumni who understand the unique experience of having a student at Oxy, PC members work with Oxy Fund staff to build support for the College's programs and initiatives. PC members play a crucial role in engaging the parent community by creating awareness about how parent support impacts the student experience and encouraging philanthropic contributions at or above the leadership giving level of \$1,000. PC members also commit to supporting Oxy with their own leadership gifts. [Learn more](#) about Parents Council roles and responsibilities.

### [Reunion Committees](#)

Reunion Committees help strengthen the connections alumni have with the College and each other in commemoration and celebration of their Oxy experience. They help plan the reunion experience and augment class pride by encouraging their peers to participate and contribute to Oxy in honor of their milestone reunions (5th, 10th, 15th, 20th, 25th, 30th, 35th, 40th, 45th and 50th). Reunion committees also inform and develop class-specific giving initiatives, serve as signatories on class fundraising communications, and advocate for class participation on Oxy's annual giving day, the Day For Oxy. [Learn more](#) about Reunion Committee roles and responsibilities.

### [Senior Class Gift Committee](#)

Senior Class Gift committee members help instill a culture of giving back to Oxy when alumni are still students on campus. The Senior Class Gift Committee encourages participation-based recurring giving to ensure that students' most meaningful Oxy experiences continue to be available for future Tigers. [Learn more](#) about the Senior Class Gift Committee.

### [Student Philanthropy Council](#)

The Student Philanthropy Council (SPC) is an extension of the College's Institutional Advancement (IA) Office. This representative student group advises the IA team on ways to build a culture of philanthropy among the current student body. The mission of the SPC is to educate the student population about the role of philanthropy at Oxy and inspire a lifetime connection to the College through giving back, both as students and as alumni. [Learn more](#) about the Student Philanthropy Council.

## WHAT IS THE OXY FUND?

Each year, thousands of alumni, parents and friends support the Oxy Fund and make an immediate impact with their giving.

Gifts to the Oxy Fund are critically important to student life and wellness, academics, and every other aspect of the unique Oxy experience, from financial aid and faculty research to athletics and the arts. Unrestricted annual gifts provide approximately 4% of the College's operational budget, underwriting expenses across all departments, programs and organizations.

When we say that *every gift matters*, we mean it. Here are some ways your Oxy Fund gift provides immediate support across campus:



### Financial Aid & Scholarships

Oxy is committed to meeting 100% of families' demonstrated financial need, and 78% of Oxy students receive some form of financial assistance. Gifts to financial aid and current-year scholarships provide promising students access to an Oxy education, regardless of their financial means, and allow students to focus on making the most of their Oxy experience.

### Student & Faculty Experiences

The Oxy Fund enables students and faculty to do their best and most innovative work, supporting life-changing experiences outside of the classroom including internships, fellowships, study abroad, and undergraduate research.

### Inclusive Campus Life

Gifts to the Oxy Fund help advance justice, equity, inclusion and diversity at Oxy, supporting campus-wide opportunities and creative programming that foster a learning and residential environment in which students of all identities feel they belong and can thrive.

### Innovation & Immediate Needs

The Oxy Fund provides reliable and flexible funds that allow the College to address pressing needs, seize unexpected opportunities and capitalize on innovative new ideas. Annual support ensures Oxy will remain adaptable, resilient and a leader in the liberal arts for generations to come.

To learn more about the Oxy Fund, visit our [Oxy Fund FAQ page](#).

## VOLUNTEER RESOURCES

### Academic Calendar & Important Community Events

Oxy's approved 2024-2025 academic calendar can be accessed [here](#). Please save these dates:

October 18-19, 2024	Homecoming & Family Weekend
April 23-24, 2025	Day For Oxy annual giving day
June 6-8, 2025	Alumni Reunion Weekend

### 2023-2024 Oxy Fact Sheet

The [2023-2024 Oxy Fact Sheet](#) contains information about today's student body, financial aid stats, faculty, finances, fundraising, history, campus, curriculum and programs. It also includes a telephone directory of campus offices.

### Learn about Occidental's 17th President, Dr. Tom Stritikus!

[Video introduction](#) | [Occidental magazine article](#)

### Occidental Magazine

[Occidental magazine](#) provides campus news, in-depth features, and profiles of exceptional alumni.

### Occidental Stories

Hear from the people that make up our exceptional community! Get to know more about our faculty and their impactful research, find out what drives our students, and see how our graduates are making an impact in the world. [Meet some of the people that help make Oxy what it is.](#)

### The Occidental Promise | Occidental's Integrated Strategic Plan

Occidental aims to be the country's principal destination for a distinctive urban liberal arts experience by 2030. At the heart of the 50-page integrated strategic plan, known as "[The Occidental Promise](#)," is the vision statement that will guide Occidental into the future:

*"Occidental College will be the principal destination for a distinctive urban liberal arts experience, one that engages the full potential of global Los Angeles at its doorstep. With a commitment to academic excellence, equity and justice, immersive student learning, and an innovative pedagogy that creates meaningful opportunities for hands-on research and practical experience, Occidental prepares our graduates to lead fulfilling lives of impact."*

To realize that vision, the plan calls on Occidental to focus on three interdependent strategic initiatives based on the College's existing strengths:

- Fostering academic excellence through an immersive education that is hands-on, project-based, and community-engaged.
- Deepening and expanding College partnerships with Los Angeles community, civic, and industry organizations, creating distinctive learning opportunities for students and faculty. This will include the creation of a Center for Los Angeles.
- Educating the whole student, attending to well-being, resilience, and community, ever mindful of the significance of equity and inclusion in addressing their needs.

## MAKING A CASE FOR GIVING

Sometimes asking for a gift to support Oxy is not enough. The most successful asks connect potential donors to the “why” of giving. Here are a few reasons to support Oxy:

### About Oxy

Oxy is a private liberal arts college in Los Angeles. With 2,015 students, Oxy provides an intimate residential education experience in the heart of a global city—the best of both worlds, since students have the advantages of a small and a large community. In fact, Oxy is one of only 10 liberal arts colleges located in a major urban center, and is one of the most diverse liberal arts colleges in the United States.

### Financial Facts & Figures | Oxy’s Commitment to Access and Opportunity

- In 2023-2024, the cost to attend Oxy was \$81,730, which included tuition and fees (\$62,850) and housing and food (\$18,284).
- 78.11% (1,574) of Occidental’s 2,015 students receive some form of financial assistance, including scholarships, grants, loans and student employment.
- Oxy is committed to meeting 100% of demonstrated financial need.
- Oxy spent \$49,117,971 on institutional financial aid in 2022-2023.
- The average financial aid package is \$43,118.
- 12% of Oxy students are the first in their families to attend college.
- 16.07% (324 students) are Pell Grant recipients.

### Class of 2027 Profile

- 6,573 applications received, with a 39% acceptance rate
- Median combined SAT\*: 1420, Median ACT Composite\*: 33, Median unweighted GPA: 3.73
- 48% domestic students of color, 25% underrepresented minority, 14% first-generation college students
- 15% Pell Grant recipients
- 52% female, 41% male, 7% non-binary
- 42 different languages spoken
- 64% from outside California, including 38 states and D.C, 5% international students from 24 countries

*\*Based on the 34% of incoming first-year students who submitted test scores.*

### Curriculum & Faculty

- Average class size: 18 students (0% of classes have more than 50 students).
- 35 majors and 10 additional minors (most popular majors: economics, diplomacy and world affairs, psychology, biology, computer science, urban and environmental policy).
- Many majors are interdisciplinary, compiling required courses from multiple academic departments.
- Each major culminates with a comprehensive examination or project, called “senior comps.”
- First-year students complete the First Year Seminars (FYS) to hone critical thinking, writing and research skills.
  - FYS course options have included: Gender and Pop Culture; The American Dream:



Critics and True Believers; This is Your Brain on Art; Reacting to the Past; How to Understand the World; and Lie, With Maps.

- The Core Program requires students to explore courses outside their major, to develop skills in historical and cultural analysis, the arts, foreign languages, science and quantitative reasoning.

### Diversity at Oxy

- Oxy is one of the most diverse liberal arts colleges in America, with a student body, faculty and staff that represent a broad spectrum of races, ethnicities, identities, sexual orientations, cultures, backgrounds and beliefs.
- Oxy's Office of Equity & Justice programming promotes cultural competency, gender equity and an inclusive campus climate that is free of violence and bias, overseen by the VP of Equity & Justice and offered through the Intercultural Community Center (ICC) and Center for Gender Equity (CGE).
- There are 17 active cultural clubs on campus, including Black Student Alliance, Japanese Cultural Organization, Hawaii Club, Pilipinx United Students, South Asian Student Association, Latinx Student Union and more.
- The ICC offers programs to establish connections among first-generation students, and with staff and faculty, in order to increase graduation rates for this group.
- The Veteran Resource Center provides support and resources for veterans to help them prepare for graduation.
- Oxy grads have held office in both major political parties, including Barack Obama '83 (D) and Jack Kemp '57 (R).

### Athletics

NCAA Division III with 20 varsity sports (11 for women, 9 for men):

- Women's sports include basketball, cross country, golf, lacrosse, soccer, softball, swimming and diving, tennis, track and field, volleyball and water polo.
- Men's sports include baseball, basketball, cross country, golf, soccer, swimming and diving, tennis, track and field and water polo.
- Oxy has numerous club sports, including men's and women's rugby, men's lacrosse, and men's and women's Ultimate. There is also a women's recreational baseball team.
- Intramural sports, including basketball, doubles volleyball, flag football, soccer and wiffle ball are also available.

### Facilities

Norris Hall of Chemistry Renovation

- The building, which opened in 1960, has not undergone significant renovations in more than 30 years. 40% of Oxy students are pursuing degrees in sciences.
- The goal is to raise \$22M to support the first phase of this multi-phase renovation. Funding partners include the W.M. Keck Foundation, Kenneth T. and Eileen L. Norris Foundation, the Fletcher Jones Foundation and the Hearst Foundation as well as many individual donors.
- First phase: underutilized basement turned into teaching laboratories and creation of an Academic Mastery Program Center with flexible indoor/outdoor space.

Cannon Plaza (Named for trustee and lead donor Anne Wilson Cannon '74)

- The Taylor Pool was converted into the Cannon Plaza, a beautiful outdoor multipurpose space near the front of campus.

## Internship Programs

- The Hameetman Career Center (HCC) provides internship advising and manages hundreds of internship postings weekly.
- InternLA is an HCC donor-funded internship program providing full-time paid summer internships for 40-50 students with employers across L.A. in a variety of sectors.
- 75% of students hold at least one internship while at Oxy.
- The urban & environmental policy major offers affordable housing, environmental justice & policy, and public health internship programs with full-time paid summer internships.
- The Office of Religious & Spiritual Life manages the Values & Vocations Fellowship with funding for summer or academic-year internships that allow students to explore the intersection between social justice and spirituality.

## Oxy Abroad

- The International Programs Office (IPO) oversees both domestic students who want to study away/abroad and Occidental's international student population.
- Internationally, students can apply to over 100 study-abroad programs across Africa, Asia, Europe and Latin America. Only 50% study in European countries.
- Oxy's unique domestic programs include:
  - Campaign Semester – In the fall of an election year, students travel to a battleground state and work on a gubernatorial, house, senate or presidential campaign, returning to campus for a seminar on election politics.
  - Kahane UN Program – Students intern full-time at a UN-related agency and take two courses while living in New York City.

## Undergraduate Research & Community Involvement

- The Undergraduate Research Center (URC) funds approximately 125 students to conduct full-time research with a faculty mentor over the summer – while living on campus.
- The National & International Fellowships Office connects students with funding opportunities for national and international research. Oxy has been a top producer of Fulbright winners for 13 years.
- Oxy students traditionally comprise 30% of the presenters at the Southern California Conference on Undergraduate Research.
- The Center for Community Based Learning identifies community partnerships that address real needs, supports student-run community service, and assists faculty to integrate community projects within courses.
- The Occidental College Community Literacy Center provides one-on-one reading and writing instruction for children in kindergarten through the sixth grade, with tutoring from Oxy students twice a week for a semester.
- The Office of Student Leadership, Involvement, & Community Engagement manages campus-wide community service efforts, including the 9/11 Day of Service and Remembrance, MLK Day of Service in January and the Alternative Break Program.

***None of this would be possible without the support of Oxy's alumni and parent community!***

## ASKING FOR GIFTS

There are many different reasons why alumni and parents give to Oxy. During your conversations, you can use some of the examples below.

**As students, you benefited from alumni support of the Oxy Fund.** When you were students on campus, alumni giving made the Occidental experience possible. Today we are asking that alumni return the favor and help ensure current and future Oxy Tigers have the opportunity and privilege to have the same life-changing experiences.



**The Oxy Fund drives down the cost of education by providing scholarships for students.** Three out of every four students you meet on campus are on financial aid at Oxy! Making a gift to the Oxy Fund makes it possible for more students to attend Oxy. You could make it more personal by mentioning that you or your child were/are receiving financial aid, if this is the case for you. Even students who do not receive scholarships benefit from scholarship support – scholarships are what make Oxy’s diverse and culturally-rich student body possible.



**Tuition and fees don’t cover the full cost of an Oxy education.** In fact, each student’s tuition and fees only cover approximately 67% of what it costs for that student to attend Oxy. Private support helps make up that 33% that is needed to pay for each student’s educational experience. We call this the “silent scholarship” that all Oxy students receive.

**Annual support opens doors for Oxy and is a vote of confidence in the College.**

Foundations and corporations often look at the level and rate of support and participation from Oxy's alumni, parents, faculty, staff and friends to determine their level of major gift support to Oxy. Consistent annual giving – of any size – signals that Oxy is worthy of their investment, opening up doors for the College to receive vital funding that supports the overall student experience. So, your participation alone will attract private and individual gifts, making a greater impact than you may originally think. One person’s small gift can result in a very large gift for Oxy!



**Gifts help improve the quality of education at Oxy.** When alumni, parents, and friends participate in the Oxy Fund, it allows us to enhance areas such as the library, study abroad, and research opportunities. Private support is extremely important in helping provide faculty and students with the best tools and newest technology.

***Every single gift makes a difference and has a significant effect on Oxy students.***

## NAVIGATING THE CONVERSATION

Use these guidelines during your outreach and in conversations with alumni and parents.

### Make Your Own Gift

As a volunteer, you set the example for giving. Ideally, a volunteer will make their own commitment before making solicitations. Our goal is 100% participation from volunteers.

### Before You Call

Prepare. Familiarize yourself with the case for giving to the Oxy Fund and its impact on the student experience.

Think about your own reasons for giving to Oxy and develop a brief statement about why you believe supporting Oxy is important.

### During the Conversation

Be positive and optimistic. You are sharing the opportunity to participate in the future of Oxy. Smile and enjoy yourself! Your frame of mind will come through in your voice.

Appeal to the heart. Focus on memories, shared experiences, and common bonds to help motivate giving.

Be specific about why you are calling – that you are calling on behalf of the Oxy Fund to ask them to join you in making a gift.

Be direct. Ask them to make a gift that is meaningful to them. Remind those you speak with that every gift - in any amount - makes a difference.

Be silent after asking, even if it feels uncomfortable. Give the person a moment to think, and allow them to begin the conversation again after considering your ask. Don't forget that they can fulfill their pledge by an installment plan that can extend to fiscal year-end on June 30.

Inquire about matching gift availability with their employer.

Say thank you! These are the most powerful words you can use. Regardless of the outcome of your ask, thank your fellow alum or parent for taking the time to talk with you. Their positive experience with you will set the stage for future gifts and involvement with Oxy.

### After the Conversation

Send a thank you note to thank them for their time, whether or not it resulted in a pledge or gift to Oxy.

Be persistent. Even if you didn't reach them the first time, try different ways to reach your prospect – email, phone, even a personal letter.

If you are not able to answer a particular question, tell your peer you will have someone at Oxy communicate directly with them.

Communicate the results of your conversation with Oxy Fund staff using the [Alumni and Parent Conversation form](#). Please include contact information updates, their pledge amount, and any personal updates that you feel are important for Oxy to know (e.g. new job, recently got married).

## ADDRESSING HESITATIONS AND CONCERNS

Oxy wants its alumni and parents to feel good about giving to the College. Finding a way to address hesitation and indecision in the conversation will allow them to have confidence in making a gift to Oxy.

- Acknowledge the objection, hesitation, or concern.
- Allow your peer to feel heard and let them know you are listening to their concerns.
- Emphasize that their support and voice are still an integral part of Oxy. Provide a reason to give to Oxy that relates to their initial objection, and ask them to consider giving.

### Common Objections to Giving

Objection: "I'm in grad school/between jobs/have kids in college/just bought a house and am not in a financial position to give."

Response: "Your hesitation is understandable. What would be a more comfortable amount for you given your current situation? Gift amounts of any size are appreciated and have an impact!"

This is the most common type of refusal. In many cases, the prospect cannot afford to make a large donation and may be intimidated by the primary ask. The goal in these situations is to find a level of giving where the prospect feels comfortable. It's important to express that gifts of any size are impactful and that participation is key.

Objection: "I'm not happy with the way Oxy handles a certain issue with its students and faculty."

Response: "Thank you for sharing your concern with me. I encourage you to give because your gift will go towards strengthening Oxy's infrastructure in allowing us to address these issues. Ultimately, your gift still impacts the student experience on campus."

This category of refusal can be the most challenging to address because the reasons for dissatisfaction can often be exclusive to the prospect's experience with Oxy. Prospects who have reasons to be disinterested in Oxy often want to be heard and it is important that you show them that you are listening to their concerns. In this situation, focus on the benefits of improving the quality of education at Oxy. Concentrate on the big picture and take their attention away from the specific area of their concern. If your prospect has issues with Oxy then it might be beneficial to encourage them to designate their gift to student scholarships so that they are supporting students directly.

If someone requests an Oxy Fund brochure or other materials that you aren't able to access, please submit your contact notes and specifics about their request via the online [Alumni and Parent Conversation form](#). A member of the Oxy Fund staff will follow up with that individual.

## WAYS TO GIVE

Making a charitable gift to Occidental creates an impact that will very likely exceed expectations, and donors have many giving opportunities to choose from.

### Online

Donors may access Oxy's [online giving form](#) to make a one-time or recurring gift to the Oxy Fund, Financial Aid, or other area of the College that has special meaning for them.

### Mail

Checks may be made payable to Occidental College and mailed to:

Occidental College  
Advancement Services  
1600 Campus Road, M-45  
Los Angeles, CA 90041

In the check memo, donors should include the gift purpose (if a designated gift), their full name, and their class year (if applicable).

### Phone

Donors may call (323) 341-4OXY (4699) to make their gifts over the phone.

### Recurring Gifts

A recurring gift is an easy and convenient way to provide sustaining support to Oxy at a pace that is comfortable for the donor. Credit cards can automatically be charged monthly or annually, and signing up is easy. Donors may visit our [online giving form](#) and select the recurring gift button. As our most loyal supporters, they join the McMenamin Society, which recognizes and celebrates consistent annual support of Occidental College.

### Multi-Year Pledges

A multi-year pledge allows donors to spread pledge payments over a period of time – up to five years – so they can make a larger commitment to Oxy that they can fulfill at a comfortable pace. If a donor wants to make a multi-year pledge, please have them contact [giving@oxy.edu](mailto:giving@oxy.edu) or call (323) 341-4OXY (4699). A gift officer will follow up with a gift intention form to establish their donor recognition preferences, gift designation and to determine an agreed-upon pledge payment schedule.

### Donor Advised Fund (DAF)

A donor advised fund (DAF) is a tax-smart vehicle for annual charitable giving. Donors can contribute different types of assets (cash, stocks, money in IRAs, etc.) to start their DAF at a sponsoring organization. The assets then grow in the DAF tax-free and the donor can recommend gifts to any qualified 501(c)3 public charity, including Occidental. In addition to ensuring financial support to Oxy, giving through a DAF provides an immediate tax deduction for the donor. If a donor has a DAF, they can recommend a gift to Oxy directly [on this page](#).

## Matching Gifts

Matching gifts are an easy way to increase the impact of one's giving. Many companies match their employers' charitable contributions, sometimes up to five times the employee's personal contribution. Guidelines and amounts vary by company. A donor's personal gift and their employer's matching gift will all count toward their giving recognition, including toward any class goals and donor recognition societies. To see if the donor works for a matching gift company, they can visit [matchinggifts.com/oxy](http://matchinggifts.com/oxy).

## IRA/QCD

Donors aged 70 ½ or older can make a gift directly to Oxy from their IRA. [See details and instructions.](#)

## Electronic, Wire & Stock Transfers

For assistance, please call (323) 259-2968 or email [advancementservices@oxy.edu](mailto:advancementservices@oxy.edu).

### To transfer stocks by 12 noon EST for next-day settlement:

State Street Bank and Trust Co.

DTC Participant #: 0997

Account No. MVYJ

Agent Bank No. 26022

### To transfer mutual funds:

Please email the following information to [advancementservices@oxy.edu](mailto:advancementservices@oxy.edu):

- 1) Donor's Name
- 2) Firm name holding the mutual fund
- 3) Symbol for mutual fund
- 4) Number of shares

### To transfer cash:

State Street Bank & Trust Co., Boston

ABA # 011000028

Beneficiary Acct # (DDA): 00480624

Beneficiary Name: OCCIDENTALCOLLEGE/GIFT

Account No. MVYJ

Attn: Mark Brooks

### To transfer Federal Reserve items:

Boston Federal Reserve Bank

ABA # 011000028

STATE ST BOS/SPEC/MVYJ

## Planned Giving and Estate Planning

Browse Oxy's [Gift Planning pages](#) for detailed information about planned giving and estate planning, or contact the Gift Planning team at 323-259-2644 or [giftplanning@oxy.edu](mailto:giftplanning@oxy.edu). Planned giving vehicles include bequests, charitable gift annuities, charitable remainder trusts and much more.

## DONOR RECOGNITION SOCIETIES

Occidental College is appreciative of its generous donors and recognizes their extraordinary commitment to our community.

### Founders Court

The Founders Court honors Occidental's most generous benefactors since the College's founding in 1887. Having made cumulative gifts of \$1 million or more, these donors embody the spirit of philanthropy at its highest level.

### Occidental College Legacy Society

The [Occidental College Legacy Society](#) honors individuals who have made deferred gifts to Occidental. Deferred gifts include bequests in wills and trusts, charitable gift annuities, and charitable remainder trusts, which provide donors an opportunity to support Occidental beyond their lifetime. Established by the Board of Trustees in 1994, the Society recognizes and celebrates the generous and future-focused individuals who have created an Oxy legacy intention through estate gifts. The Society boasts over 1,000 alumni, parents and friends dedicated to the College's future.



### McMenamin Loyalty Society

The McMenamin Loyalty Society, named for Professor John McMenamin and Adelaide (Grant) McMenamin '40, who both served the College and generously supported Oxy since their graduation, recognizes those who have made gifts for at least three consecutive fiscal years, those who have sustaining gifts, and those with multi-year commitments. Donors to the Senior Class gift will be recognized upon their first gift to Oxy.

### Acknowledgments and Tax Receipts

Occidental values each and every gift to the College and aims to thank donors in a timely and meaningful way for their support. The Office of Donor Relations seeks to issue a tax receipt to the legal donor of a gift (as defined by the IRS) by mail within approximately one week of Occidental's acceptance of the gift.

Occidental College is a 501(c)(3) tax-exempt organization and its employer identification number (EIN) is 95-1667177. Oxy's fiscal year runs from July 1 through June 30.



## OXY FUND STAFF DIRECTORY



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