

Philanthropy Matters:

Expert Advice on Making the Ask

VOLUNTEERS *in*
PARTNERSHIP
CONFERENCE

Thomas J. Farrell '88, '90W (MS)

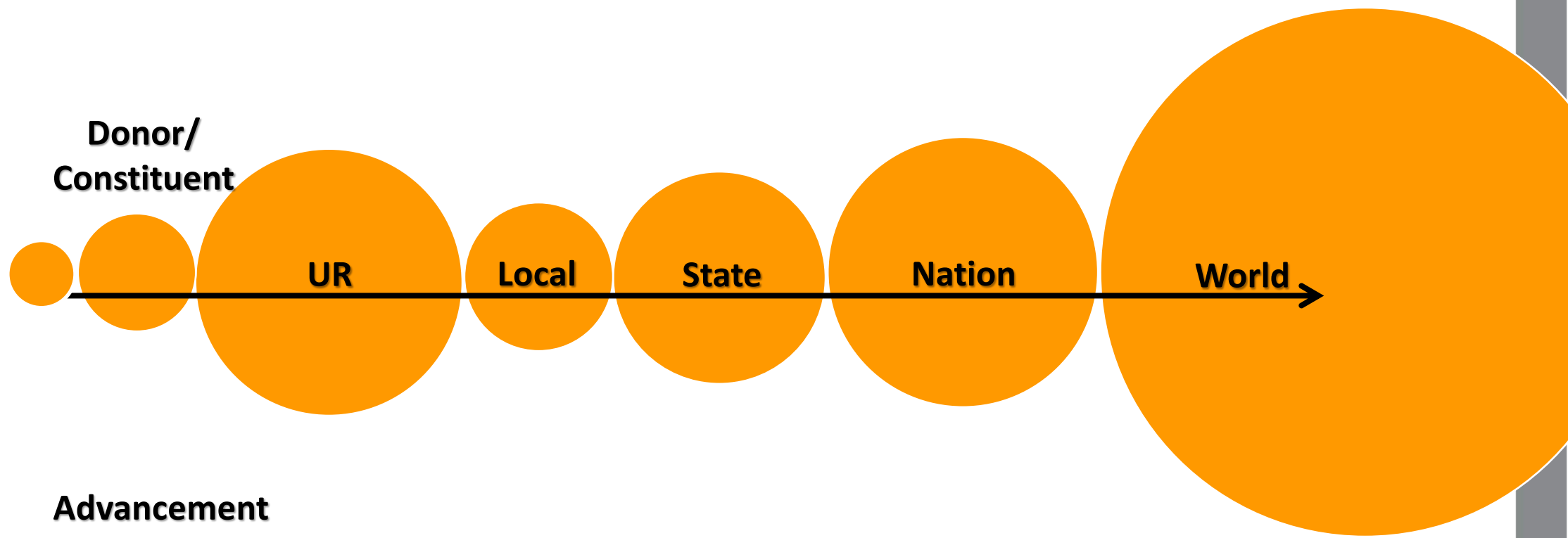
Martha Krohn | Jason Gray

Session Goals

- Describe the landscape
- UR perspective
- Skills development
- Expectation setting

UNIVERSITY OF ROCHESTER

VOLUNTEERS *in*
PARTNERSHIP



UNIVERSITY OF ROCHESTER

VOLUNTEERS *in*
PARTNERSHIP

Strategic Vision







Past

Present

Short-Term

Mid-Term

Long-Term



Foundations

Corporations

Alumni

Friends

Parents

Age/ Life
status

School/ Area

Gender

Race/
Ethnicity

Geography

Majors/
Affinity

Wealth

Involvement

Attitude/
Interest

Competition

UNIVERSITY OF ROCHESTER

VOLUNTEERS *in*
PARTNERSHIP

Schools

- Arts, Sciences & Engineering
- School of Arts & Sciences
- Hajim School of Engineering & Applied Sciences
- Eastman School of Music
- School of Medicine and Dentistry
- School of Nursing
- Eastman Institute for Oral Health
- Simon Business School
- Warner Graduate School of Education

River Campus/ Units

- River Campus Libraries
- Athletics
- The College
- Laboratory for Laser Energetics
- Memorial Art Gallery
- Susan B. Anthony Center

Hospitals/ URMC

- Strong Memorial Hospital
- Golisano Children's Hospital
- Highland Hospital (an affiliate)
- Thompson Health (an affiliate)
- Noyes Health (an affiliate)
- Jones Memorial Hospital (an affiliate)
- Health Services Division
- Eastman Institute for Oral Health
- Flaum Eye Institute
- Neuromedicine Pain Management Center
- Clinical & Translational Science Institute
- Strong West
- Wilmot Cancer Institute
- Visiting Nurse Services

UNIVERSITY OF ROCHESTER

VOLUNTEERS *in*
PARTNERSHIP

- Parents
- Alumni
- Faculty

- Staff
- Students
- Friends

- Corporations
- Foundations

- Endowment
- Capital
- Current Use/ Operations



UNIVERSITY OF ROCHESTER

VOLUNTEERS *in*
PARTNERSHIP

Commitments	Actual YTD	Actual YTD	Variance		Actual YTD	Variance		Fiscal Year Goal		Full Year
	2018	2017	2017	% delta	3Year Avg*	3Year Avg	% delta	2018	% of Goal	2017
URMC	\$59,979,757	\$37,278,866	\$22,700,890	60.9%	\$49,481,392	\$10,498,365	21.2%	\$65,000,000	92.3%	\$55,453,684
School of Nursing	\$1,388,986	\$1,531,458	(\$142,472)	-9.3%	\$1,299,985	\$89,001	6.8%	\$1,800,000	77.2%	\$1,583,256
ASE	\$36,455,247	\$32,706,728	\$3,748,518	11.5%	\$31,710,057	\$4,745,189	15.0%	\$40,000,000	91.1%	\$37,359,288
RC Libraries	\$1,907,476	\$1,647,047	\$260,428	15.8%	\$1,888,690	\$18,786	1.0%	\$1,400,000	136.2%	\$1,758,260
Eastman	\$4,361,726	\$6,639,699	(\$2,277,973)	-34.3%	\$6,187,888	(\$1,826,162)	-29.5%	\$8,500,000	51.3%	\$9,022,563
Simon	\$5,349,568	\$2,231,726	\$3,117,842	139.7%	\$10,895,493	(\$5,545,925)	-50.9%	\$6,500,000	82.3%	\$5,802,380
Warner	\$4,183,420	\$2,793,456	\$1,389,964	49.8%	\$1,294,437	\$2,888,983	223.2%	\$2,000,000	209.2%	\$2,924,735
MAG	\$5,003,442	\$5,530,220	(\$526,778)	-9.5%	\$3,232,176	\$1,771,266	54.8%	\$4,000,000	125.1%	\$6,092,049
University General	\$3,270,234	\$4,143,620	(\$873,386)	-21.1%	\$3,074,927	\$195,307	6.4%	\$5,200,000	62.9%	\$5,184,117
TOTAL	\$118,603,392	\$91,324,315	\$27,279,077	29.9%	\$105,876,370	\$12,727,022	12.0%	\$140,000,000	84.7%	\$121,838,816

Type	Actual YTD	Actual YTD	Variance		Actual YTD	Variance		Goal FY	Variance	Full Year
	2018	2017	vs. 2017	% delta	3Year Avg	vs. 3Year	% delta	2018	% of Goal	3Year Avg
Outright Gifts	\$39,598,045	\$35,848,932	\$3,749,113	10.5%	\$32,503,475	\$7,094,571	21.8%			\$41,589,735
Pledges	\$79,005,347	\$55,475,382	\$23,529,964	42.4%	\$73,372,895	\$5,632,452	7.7%			\$94,025,677
Total	\$118,603,392	\$91,324,315	\$27,279,077	29.9%	\$105,876,370	\$12,727,022	12.0%	\$140,000,000	84.7%	\$135,615,412
Deferred	\$1,416,897	\$6,248,846	(\$4,831,948)	-77.3%	\$4,812,482	(\$3,395,584)	-70.6%			\$6,393,695
All Bequest	\$33,010,662	\$26,450,281	\$6,560,381	24.8%	\$41,178,230	(\$8,167,569)	-19.8%			\$48,459,543
GIK	\$1,101,924	\$537,760	\$564,164	104.9%	\$667,812	\$434,112	65.0%			\$1,680,095

Gift Source

Alumni	\$42,864,425	\$46,355,943	(\$3,491,519)	-7.5%	\$49,502,551	(\$6,638,127)	-13.4%	\$63,560,935	\$59,692,563
Parents	\$1,108,633	\$3,565,521	(\$2,456,888)	-68.9%	\$2,310,581	(\$1,201,948)	-52.0%	\$2,047,295	\$2,569,335
Friends	\$52,767,179	\$24,394,126	\$28,373,053	116.3%	\$35,592,091	\$17,175,088	48.3%	\$49,820,068	\$48,633,683
Corporations	\$4,998,642	\$4,596,240	\$402,403	8.8%	\$4,959,839	\$38,803	0.8%	\$7,426,211	\$7,220,630
Foundations	\$11,482,822	\$8,333,768	\$3,149,054	37.8%	\$8,587,878	\$2,894,944	33.7%	\$10,741,701	\$11,345,023
Other Orgs	\$5,381,691	\$4,078,716	\$1,302,975	31.9%	\$4,923,429	\$458,262	9.3%	\$6,403,789	\$6,154,178
Total	\$118,603,392	\$91,324,315	\$27,279,077	29.9%	\$105,876,370	\$12,727,022	12.0%	\$140,000,000	\$135,615,412

Gift Level

(SM)	#	\$	#	\$	#	\$	#	\$	#	\$	#	\$
\$5M+	4	\$25.3	1	\$5.0	3	\$20.3	2	\$15.3	4	\$22.4	2	\$17.5
\$1M<\$5M	17	\$28.4	18	\$32.2	-1	(\$3.8)	17	\$31.4	43	\$43.0	22	\$38.4
\$500K<\$1M	16	\$10.5	12	\$7.7	4	\$2.7	17	\$10.9	28	\$14.0	23	\$15.1
\$250K<\$500K	37	\$12.0	25	\$7.9	12	\$4.0	30	\$10.0	56	\$14.0	38	\$12.7
\$100K<\$250K	110	\$14.4	93	\$12.6	17	\$1.9	89	\$12.0	114	\$14.0	121	\$16.2
\$50K<\$100K	123	\$7.6	102	\$6.2	21	\$1.5	120	\$7.2	224	\$11.2	162	\$9.8
<\$50K	40,966	\$20.4	42,261	\$19.7	-1,295	\$0.7	43,687	\$19.1	57,239	\$21.4	62,022	\$26.0
Total	41,273	\$118.6	42,512	\$91.3	-1,239	\$27.3	43,963	\$105.9	57,708	\$140.0	62,391	\$135.6

Gift Purpose & Use

Unrestricted	\$49,792,933	\$40,308,328	\$9,484,606	23.5%	\$50,686,152	(\$893,219)	-1.8%	\$63,539,148	\$61,549,198
Student Support	\$17,204,795	\$13,933,277	\$3,271,518	23.5%	\$15,933,485	\$1,271,311	8.0%	\$23,384,066	\$22,651,713
Faculty Support	\$35,058,797	\$27,730,353	\$7,328,444	26.4%	\$29,190,036	\$5,868,761	20.1%	\$38,323,893	\$37,123,646
Facility	\$14,723,607	\$5,765,687	\$8,957,920	155.4%	\$7,739,580	\$6,984,027	90.2%	\$11,451,839	\$11,093,185
Undesignated	\$1,823,259	\$3,586,669	(\$1,763,410)	-49.2%	\$2,327,117	(\$503,858)	-21.7%	\$3,301,054	\$3,197,670
Current-Use	\$76,311,270	\$51,073,876	\$25,237,394	49.4%	\$52,527,404	\$23,783,866	45.3%	\$72,158,658	\$69,898,759
Endowment	\$37,264,078	\$37,110,323	\$153,755	0.4%	\$47,487,482	(\$10,223,404)	-21.5%	\$59,336,305	\$57,477,982
Capital	\$5,028,044	\$3,140,116	\$1,887,928	60.1%	\$5,861,484	(\$833,440)	-14.2%	\$8,505,036	\$8,238,672

*Purple highlighted cells are estimates based on history, not actual goals

FEATURED: [Complete Guide to Monthly Giving](#) [How to Raise Money From Donor-Advised Funds](#) [Make the Most of Meetings with Major Donors](#)

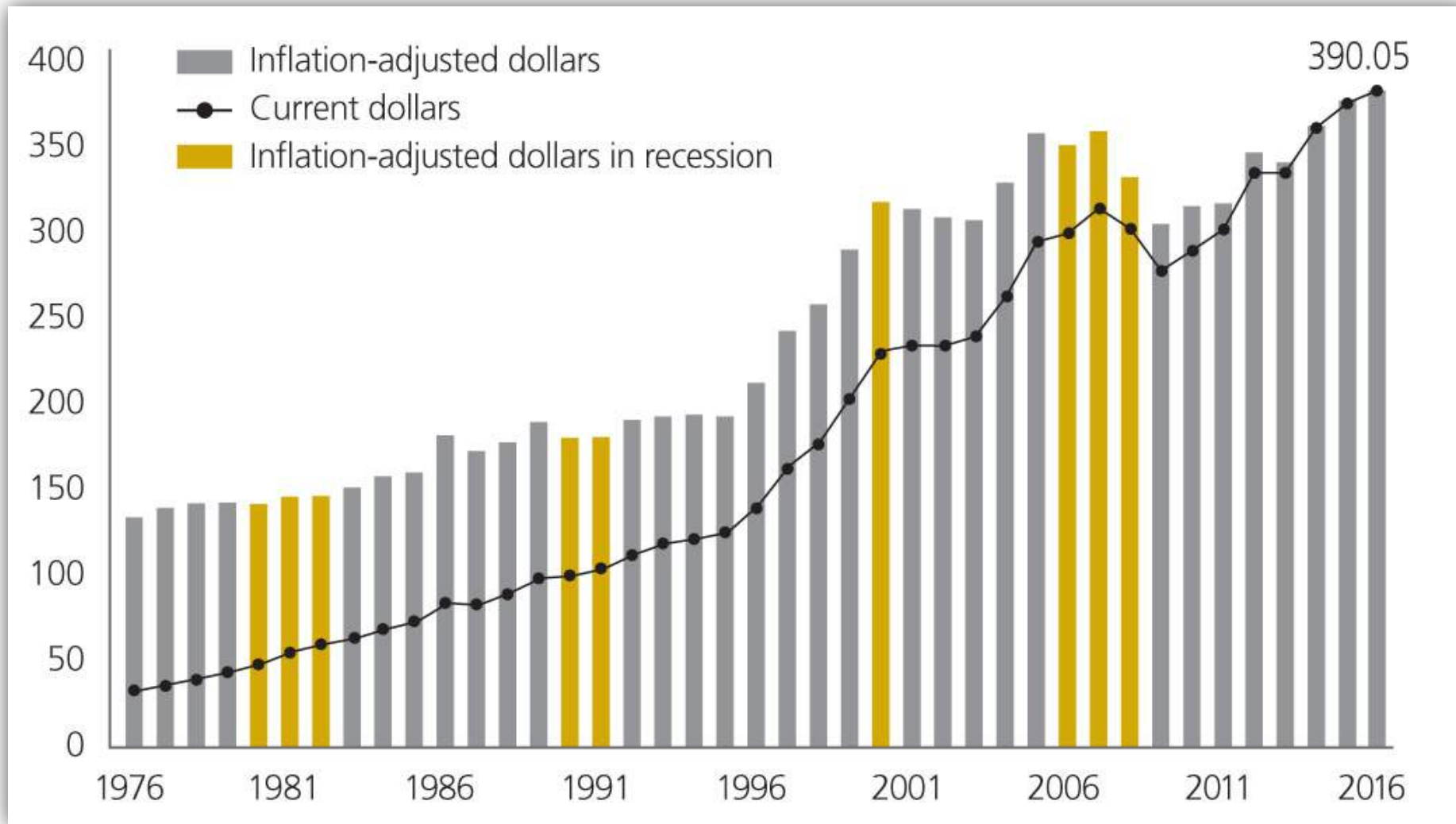
Donations Grew 1.4% to \$390 Billion in 2016, Says 'Giving USA'

By Timothy Sandoval

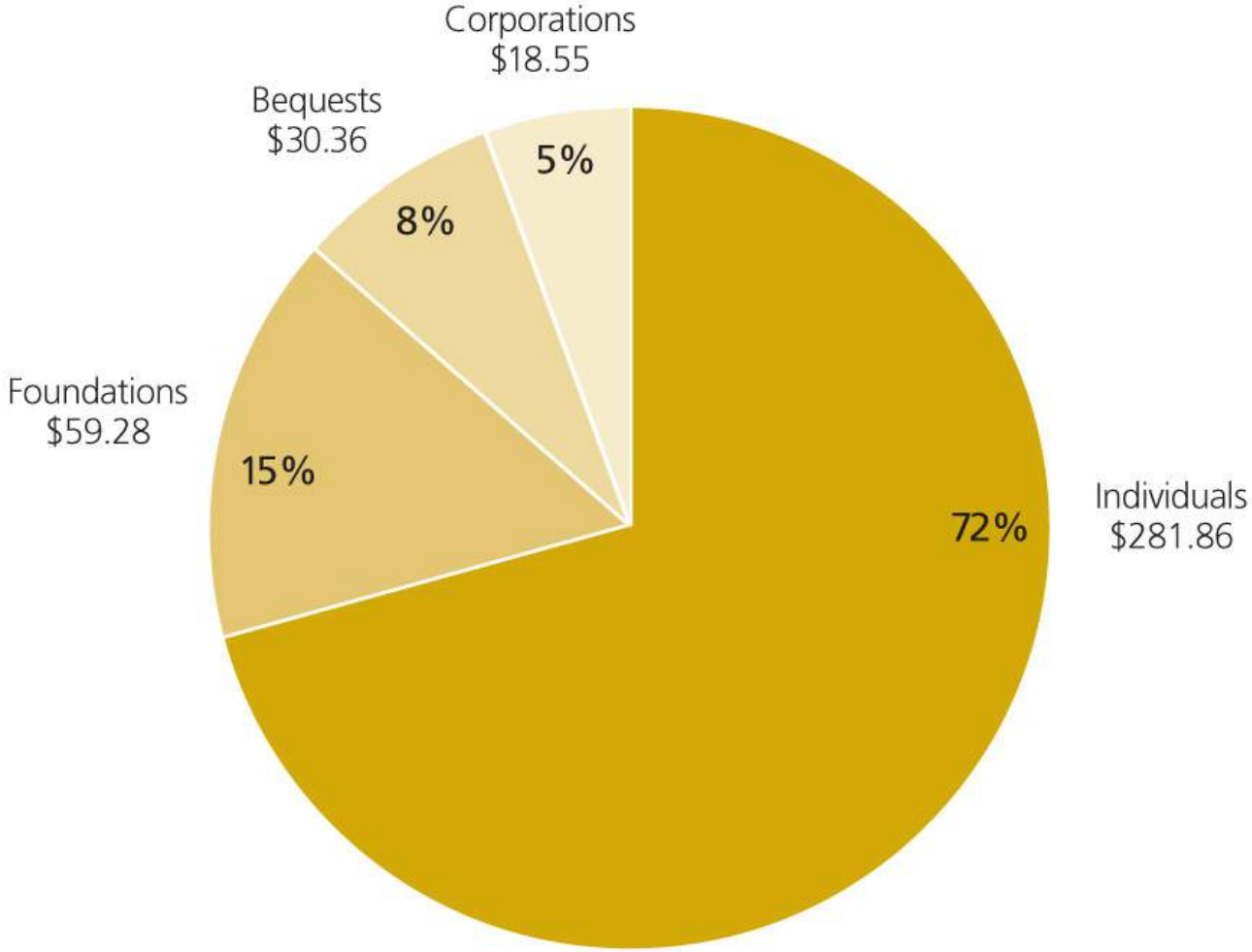


Giving USA 2017 | Annual Report on Philanthropy

Total Giving, 1976–2016 (in billions of dollars)



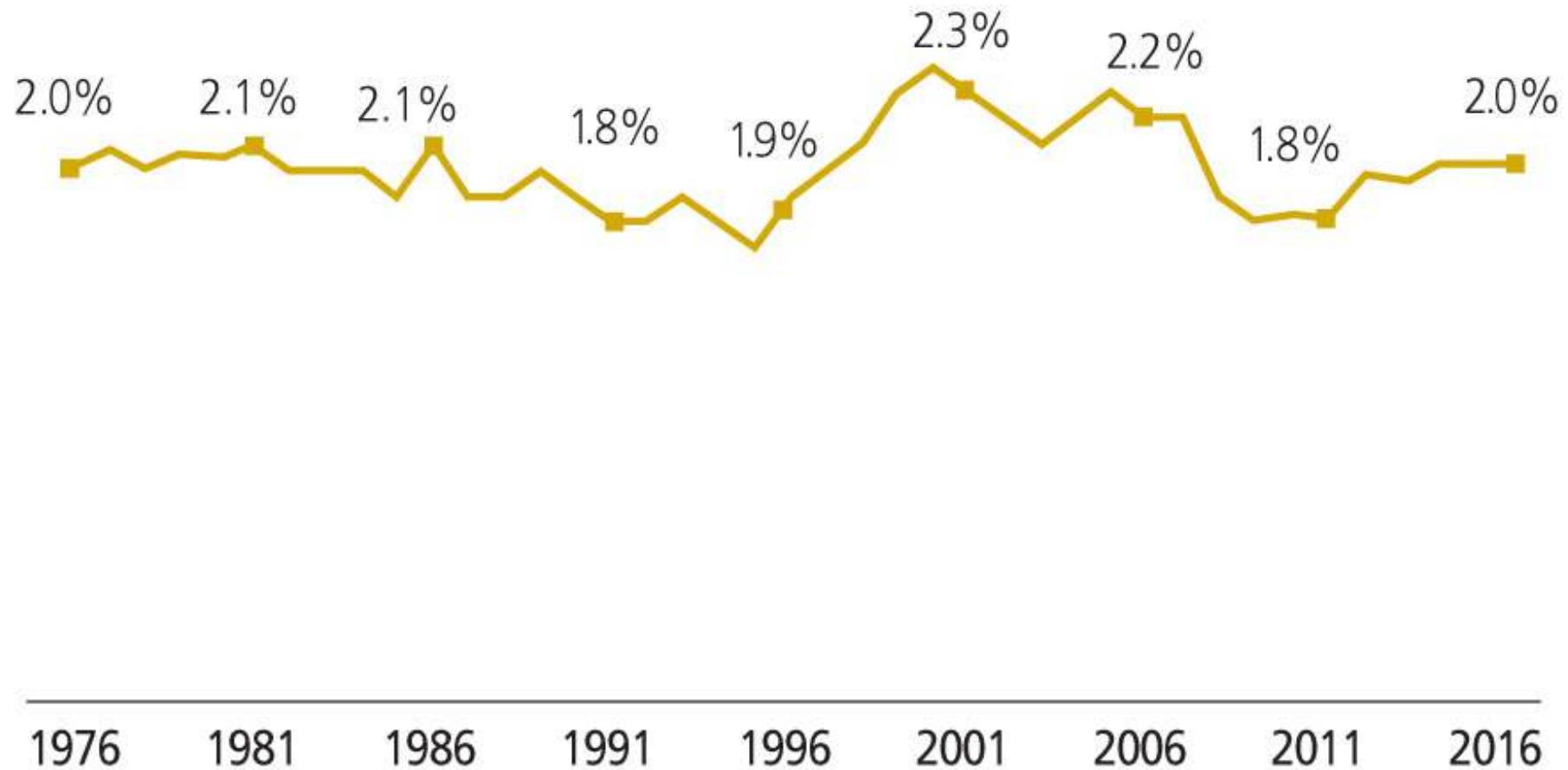
2016 contributions: \$390.05 billion by source (in billions of dollars – all figures are rounded)



Individual giving as a percentage of disposable personal income, 1976–2016 (in current dollars)



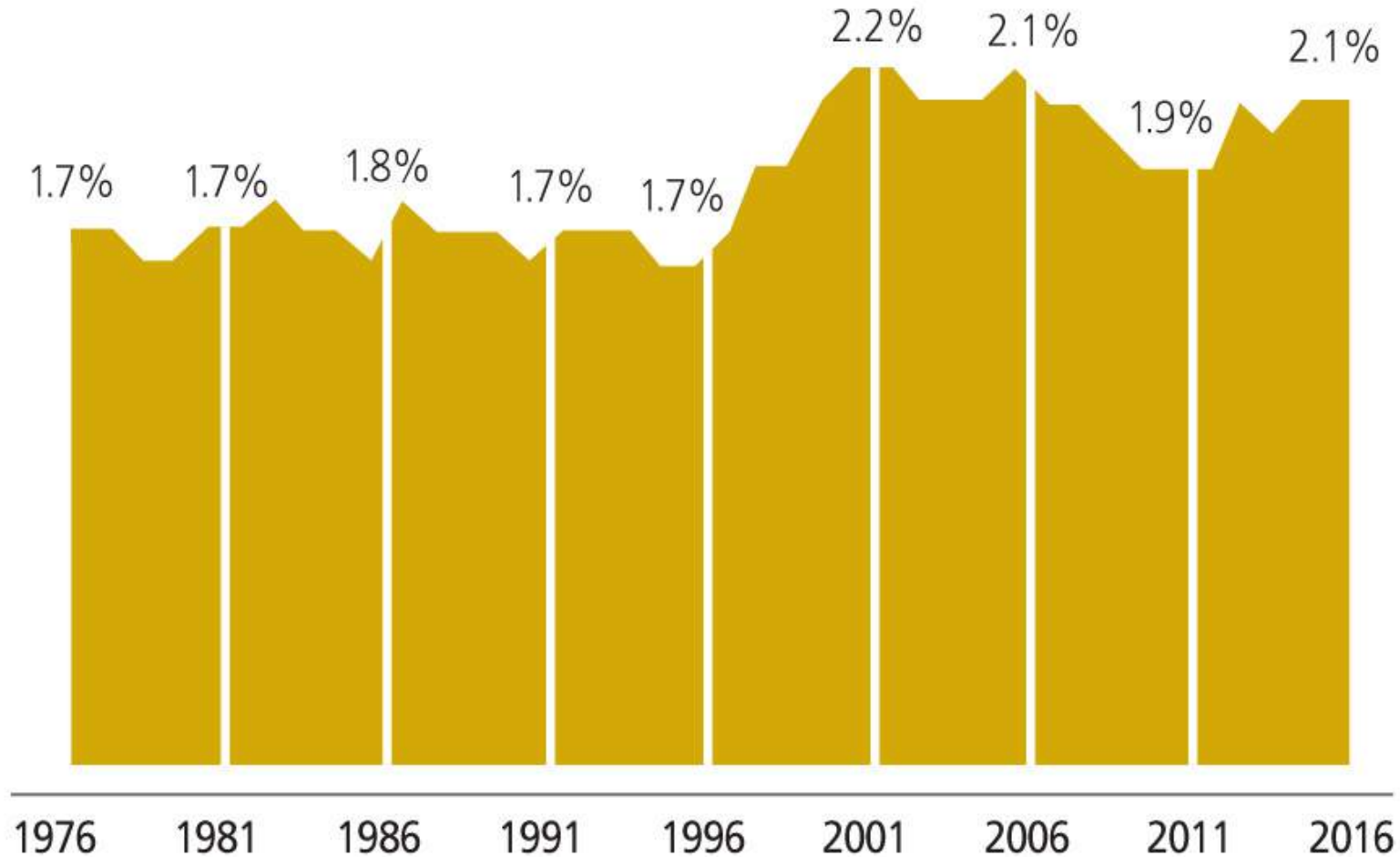
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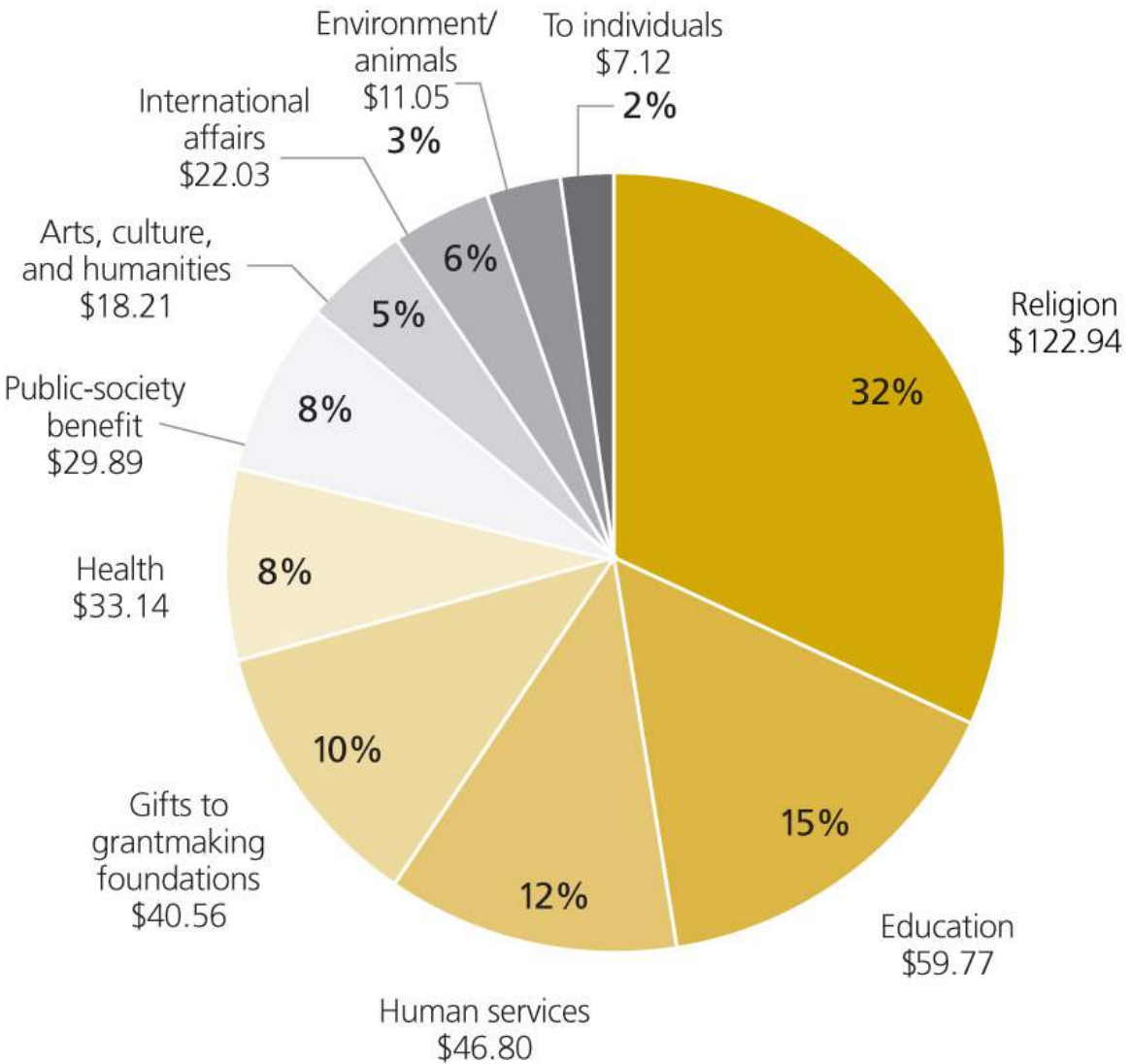
Total giving as a percentage of Gross Domestic Product, 1976–2016 (in inflation-adjusted dollars, 2016 = \$100)



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2016 contributions: \$390.05 billion by type of recipient organization (in billions of dollars – all figures are rounded)



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U.S. | EDUCATION

Giving to Colleges Jumps 6.3% to Record \$43.6 Billion in Fiscal 2017

Donations to Harvard, Stanford top \$1.1 billion each



By *Melissa Korn*



Feb. 6, 2018 10:39 a.m. ET

Donations to U.S. colleges and universities jumped to a record \$43.6 billion, thanks to last year's stock-market rally and renewed charitable activity from alumni.



Giving increased by 6.3% in the fiscal year that ended June 30, or 3.7% adjusted for inflation, according to the Council for Aid to Education's annual Voluntary Support of Education survey, released Tuesday.



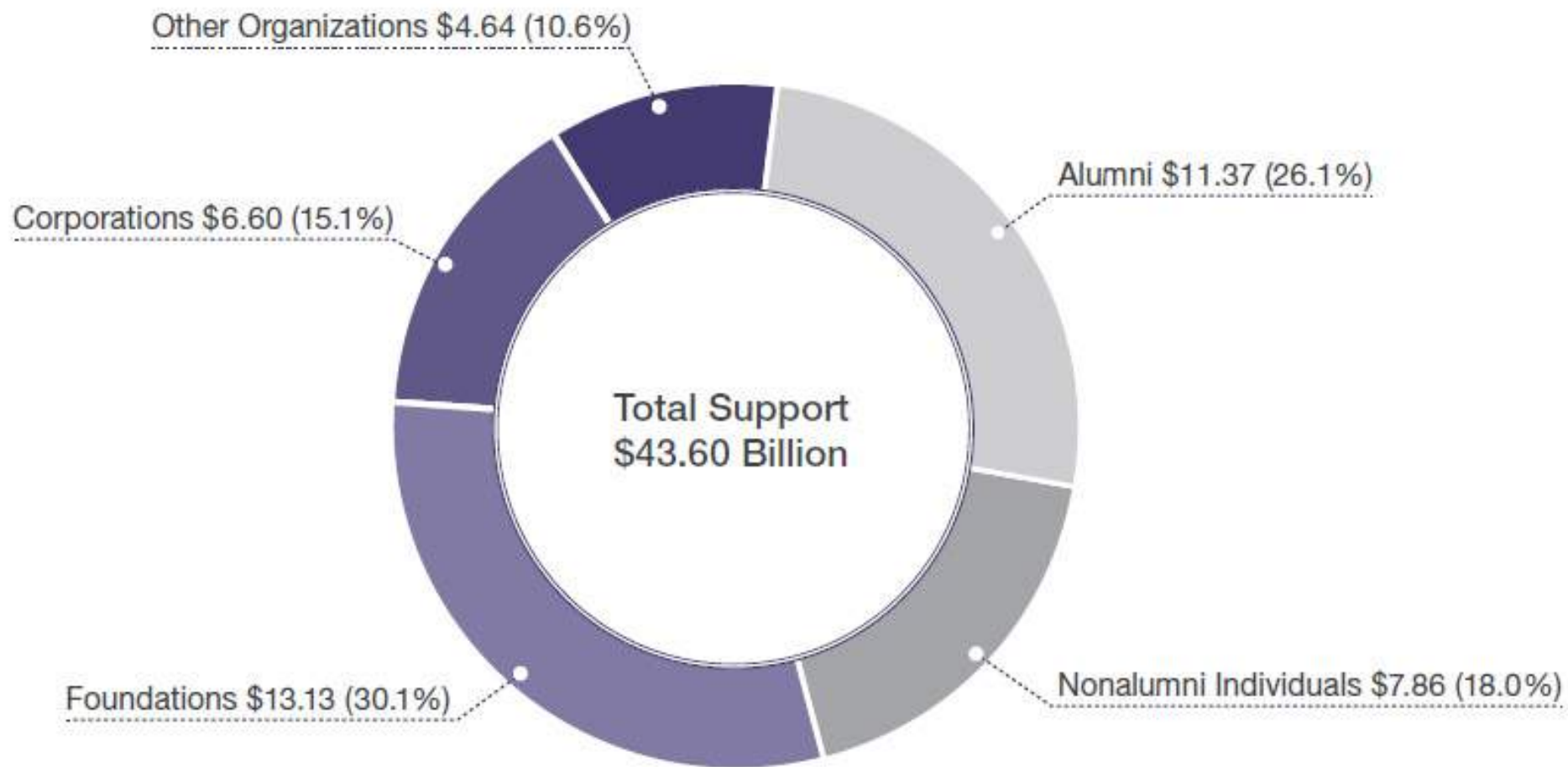
That...



TO READ THE FULL STORY

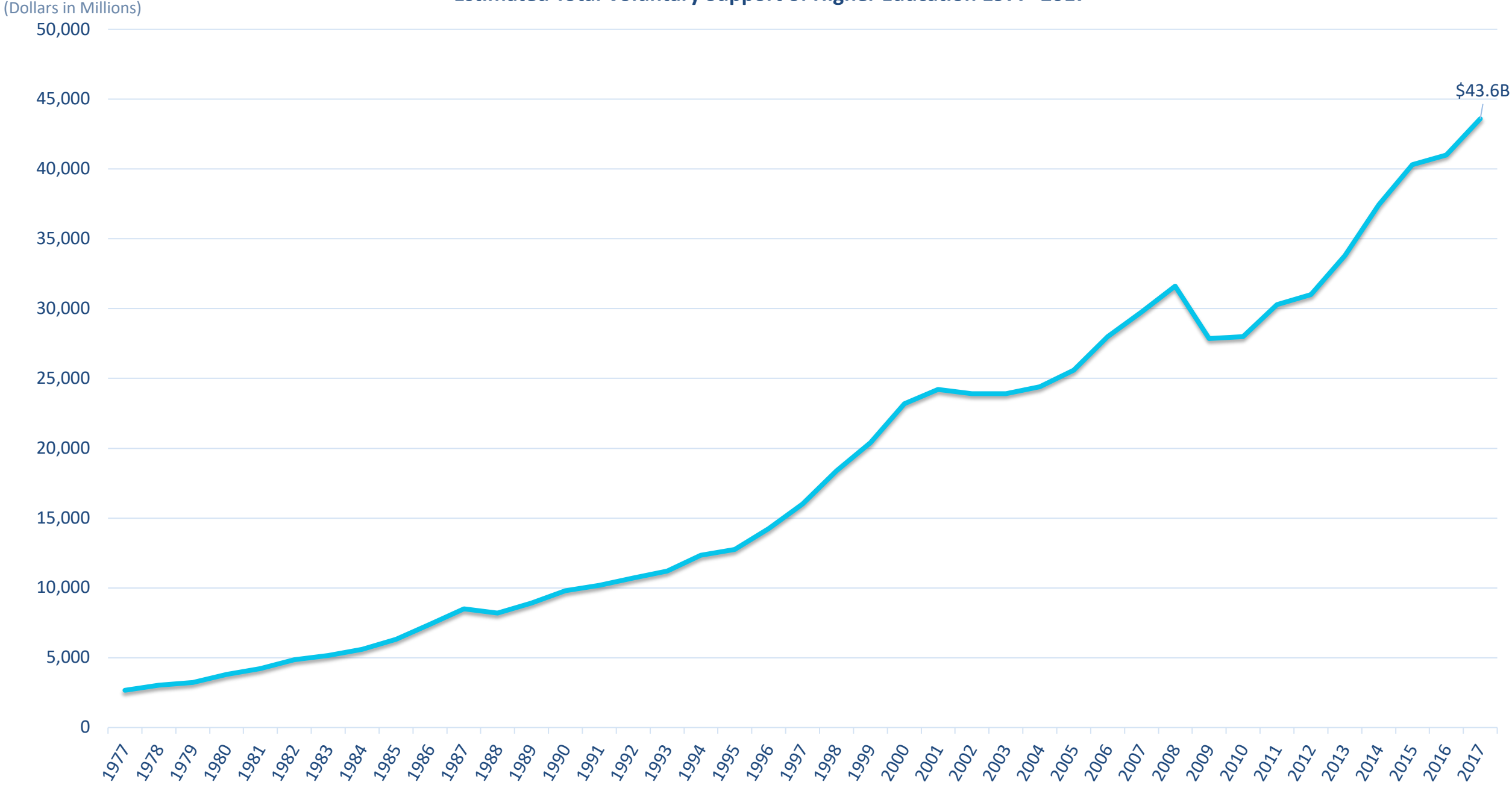


Voluntary Support of Higher Education by Source, 2017



Percentages may not add to 100 due to rounding.

Estimated Total Voluntary Support of Higher Education 1977–2017



Competition

2017 Top 20 Fundraising

1	Harvard University (Cambridge, MA)	\$	1,264,133,999
2	Stanford University (Stanford, CA)	\$	1,129,329,599
3	Cornell University (Ithaca, NY)	\$	735,126,033
4	Massachusetts Institute of Technology (Cambridge, MA)	\$	683,116,665
5	University of Southern California (Los Angeles, CA)	\$	671,294,943
6	Johns Hopkins University (Baltimore, MD)	\$	626,711,264
7	University of Pennsylvania (Philadelphia, PA)	\$	625,491,855
8	Columbia University (New York, NY)	\$	606,201,142
9	Yale University (New Haven, CT)	\$	600,339,717
10	Duke University (Durham, NC)	\$	585,678,493
11	New York University (New York, NY)	\$	570,012,773
12	University of Washington (Seattle, WA)	\$	564,356,017
13	University of California-Los Angeles (Los Angeles, CA)	\$	555,664,549
14	University of Chicago (Chicago, IL)	\$	485,560,385
15	University of Michigan (Ann Arbor, MI)	\$	468,032,224
16	University of Notre Dame (Notre Dame, IN)	\$	462,382,235
17	University of California-San Francisco (San Francisco, CA)	\$	424,475,865
18	University of California-Berkeley (Berkeley, CA)	\$	409,897,121
19	Ohio State University (Columbus, OH)	\$	403,015,734
20	Indiana University (Bloomington, IN)	\$	401,506,222

Competition

2017 Top 100 Fundraising

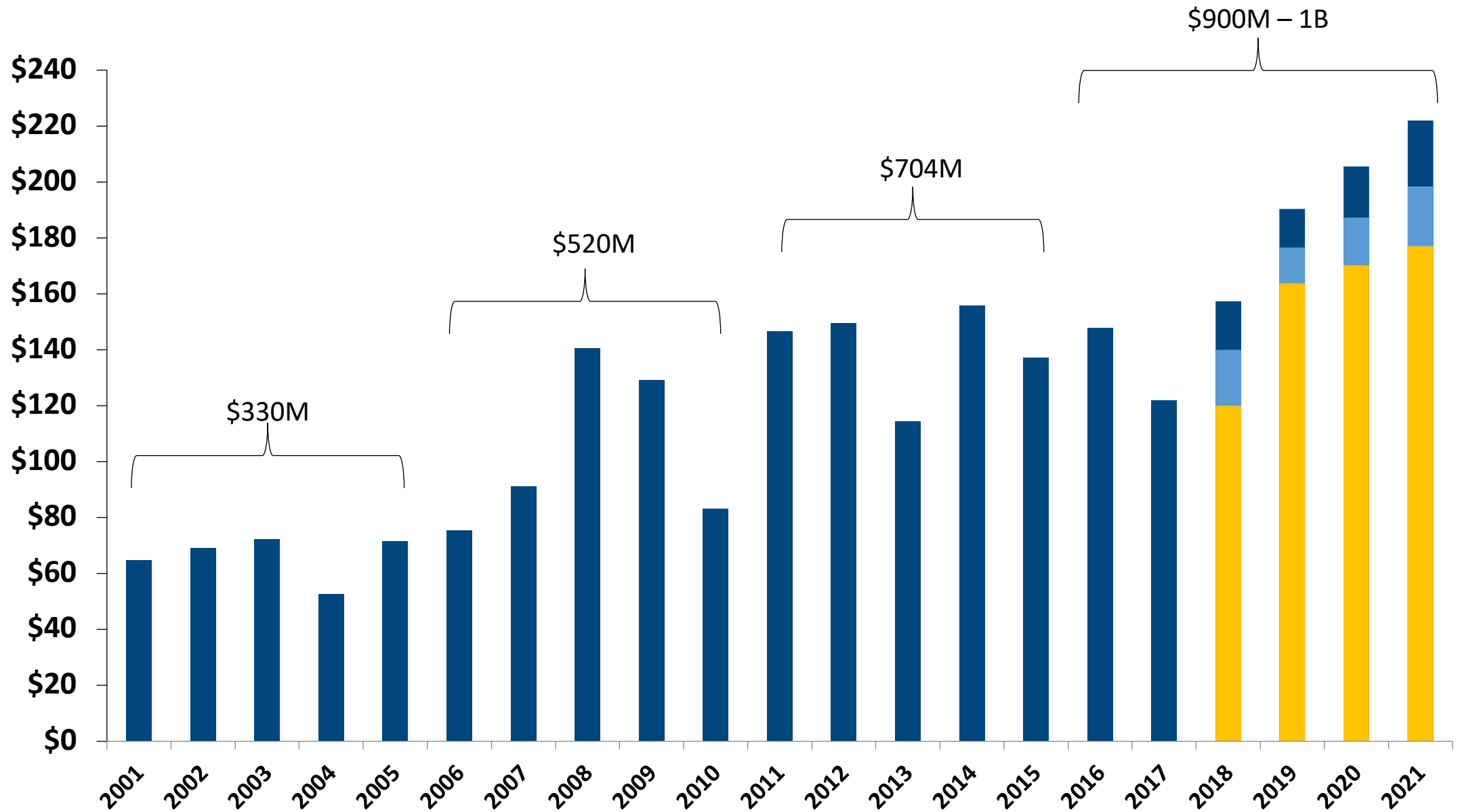
1	Harvard University (Cambridge, MA)	\$	1,264,133,999	26	Princeton University (Princeton, NJ)	\$	304,652,929
2	Stanford University (Stanford, CA)	\$	1,129,329,599	27	University of Oklahoma (Norman, OK)	\$	302,983,206
3	Cornell University (Ithaca, NY)	\$	735,126,033	28	Texas A&M University (College Station, TX)	\$	294,390,614
4	Massachusetts Institute of Technology (Cambridge, MA)	\$	683,116,665	29	Washington University in St. Louis (Saint Louis, MO)	\$	283,537,385
5	University of Southern California (Los Angeles, CA)	\$	671,294,943	30	University of Wisconsin-Madison (Madison, WI)	\$	281,777,403
6	Johns Hopkins University (Baltimore, MD)	\$	626,711,264	31	University of Virginia-Main Campus (Charlottesville, VA)	\$	270,698,868
7	University of Pennsylvania (Philadelphia, PA)	\$	625,491,855	32	University of Florida (Gainesville, FL)	\$	266,105,730
8	Columbia University (New York, NY)	\$	606,201,142	33	Brown University (Providence, RI)	\$	242,351,895
9	Yale University (New Haven, CT)	\$	600,339,717	34	University of California-San Diego (La Jolla, CA)	\$	240,201,313
10	Duke University (Durham, NC)	\$	585,678,493	35	California Institute of Technology (Pasadena, CA)	\$	237,787,043
11	New York University (New York, NY)	\$	570,012,773	36	University of Miami (Coral Gables, FL)	\$	222,092,108
12	University of Washington (Seattle, WA)	\$	564,356,017	37	University of Arizona (Tucson, AZ)	\$	220,166,102
13	University of California-Los Angeles (Los Angeles, CA)	\$	555,664,549	38	Dartmouth College (Hanover, NH)	\$	219,573,241
14	University of Chicago (Chicago, IL)	\$	485,560,385	39	Emory University (Atlanta, GA)	\$	218,587,478
15	University of Michigan (Ann Arbor, MI)	\$	468,032,224	40	University of Nebraska (Lincoln, NE)	\$	211,613,507
16	University of Notre Dame (Notre Dame, IN)	\$	462,382,235	41	Penn State University (University Park, PA)	\$	201,419,536
17	University of California-San Francisco (San Francisco, CA)	\$	424,475,865	42	Michigan State University (East Lansing, MI)	\$	200,824,554
18	University of California-Berkeley (Berkeley, CA)	\$	409,897,121	43	University of Illinois at Urbana-Champaign (Champaign, IL)	\$	199,150,216
19	Ohio State University (Columbus, OH)	\$	403,015,734	44	Vanderbilt University (Nashville, TN)	\$	194,656,454
20	Indiana University (Bloomington, IN)	\$	401,506,222	45	University of Oregon (Eugene, OR)	\$	185,938,707
21	Northwestern University (Evanston, IL)	\$	342,271,938	46	Arizona State University (Tempe, AZ)	\$	179,770,514
22	University of Minnesota (Minneapolis, MN)	\$	340,340,500	47	Iowa State University (Ames, IA)	\$	177,076,424
23	University of North Carolina at Chapel Hill (Chapel Hill, NC)	\$	328,663,876	48	Oregon Health & Science University (Portland, OR)	\$	176,366,089
24	University of Colorado (Broomfield, CO)	\$	314,717,951	49	University of South Carolina (Columbia, SC)	\$	175,110,874
25	University of Texas at Austin (Austin, TX)	\$	305,568,587	50	University of Kansas (Lawrence, KS)	\$	173,195,941

Competition

2017 Top 100 Fundraising

51	Rutgers University (New Brunswick, NJ)	\$	164,910,906	76	Tufts University (Medford, MA)	\$	106,426,558
52	University of Georgia (Athens, GA)	\$	163,544,931	77	Wake Forest University (Winston Salem, NC)	\$	105,554,309
53	University of California-Davis (Davis, CA)	\$	163,204,837	78	University of Rochester (Rochester, NY)	\$	102,493,336
54	Purdue University (West Lafayette, IN)	\$	156,548,886	79	West Virginia University (Morgantown, WV)	\$	100,844,516
55	Boston University (Boston, MA)	\$	156,366,291	80	Brandeis University (Waltham, MA)	\$	99,403,586
56	Carnegie Mellon University (Pittsburgh, PA)	\$	155,217,329	81	Oklahoma State University-Main Campus (Stillwater, OK)	\$	98,744,623
57	University of Utah (Salt Lake City, UT)	\$	153,609,577	82	Rice University (Houston, TX)	\$	98,497,564
58	University of Texas MD Anderson Cancer Center (Houston, TX)	\$	149,874,846	83	Williams College (Williamstown, MA)	\$	97,829,243
59	North Carolina State University at Raleigh (Raleigh, NC)	\$	149,223,119	84	University of California-Irvine (Irvine, CA)	\$	97,801,519
60	University of California-Santa Barbara (Santa Barbara, CA)	\$	146,870,951	85	University of Tennessee (Knoxville, TN)	\$	96,212,275
61	Boston College (Chestnut Hill, MA)	\$	141,800,049	86	George Washington University (Washington, DC)	\$	95,764,268
62	University of Iowa (Iowa City, IA)	\$	138,519,824	87	University of Alabama (Tuscaloosa, AL)	\$	95,667,178
63	Northeastern University (Boston, MA)	\$	125,998,038	88	University of Mississippi-Main Campus (University, MS)	\$	94,325,836
64	Virginia Polytechnic Institute & State University (Blacksburg, VA)	\$	125,013,240	89	Oregon State University (Corvallis, OR)	\$	93,046,516
65	University of Pittsburgh-Pittsburgh Campus (Pittsburgh, PA)	\$	122,703,176	90	University of Louisville (Louisville, KY)	\$	90,903,744
66	University of Texas Southwestern Medical Center (Dallas, TX)	\$	121,917,973	91	University of New Mexico (Albuquerque, NM)	\$	90,236,800
67	Louisiana State University College (Baton Rouge, LA)	\$	121,572,128	92	Mississippi State University (Mississippi State, MS)	\$	89,987,169
68	Georgia Institute of Technology-Main Campus (Atlanta, GA)	\$	121,416,159	93	San Diego State University (San Diego, CA)	\$	88,845,450
69	University of Kentucky (Lexington, KY)	\$	119,919,637	94	Montana State University (Bozeman, MT)	\$	88,547,627
70	University of Missouri-Columbia (Columbia, MO)	\$	119,916,950	95	Southern Methodist University (Dallas, TX)	\$	87,868,458
71	University of Maryland-College Park (College Park, MD)	\$	115,397,394	96	Kansas State University (Manhattan, KS)	\$	86,542,785
72	Case Western Reserve University (Cleveland, OH)	\$	113,982,969	97	Clemson University (Clemson, SC)	\$	85,977,255
73	University of Houston (Houston, TX)	\$	109,498,726	98	Villanova University (Villanova, PA)	\$	85,040,345
74	University of Cincinnati (Cincinnati, OH)	\$	106,833,018	99	Tulane University of Louisiana (New Orleans, LA)	\$	84,465,427
75	Auburn University-Main Campus (Auburn University, AL)	\$	106,821,357	100	Baylor University (Waco, TX)	\$	83,971,164

Millions



VOLUNTEERS *in* PARTNERSHIP

Commitments Giving Summary -

Actual as of 4/6/18

TYPE	Actual YTD <u>2018</u>	Actual YTD <u>2018</u>
(\$M)	#	\$
\$5M+	4	25.3
\$1M<\$5M	17	28.4
\$500K<\$1M	16	10.5
\$250K<\$500K	37	12
\$100K<\$250K	110	14.4
\$50K<\$100K	123	7.6
	307	98.2
< \$50K	40,966	20
	41,273	118.6

- Why do people give to UR?
- Why don't people give to UR?

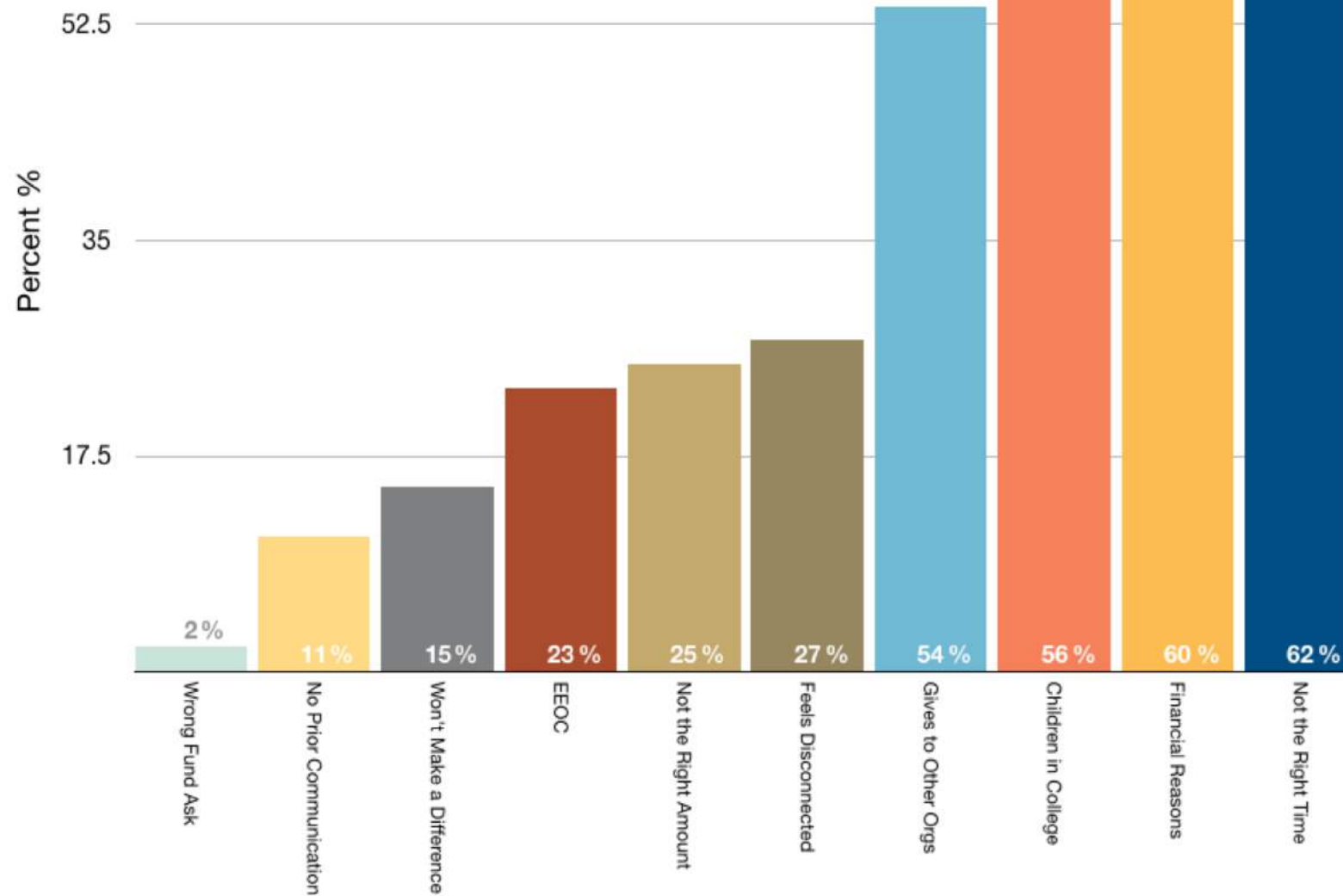
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VOLUNTEERS *in*
PARTNERSHIP

Top 10 Reasons People Give

1. When you believe that your gift can make a difference
2. Support causes you believe in
3. In order to give back
4. When you are on the Board or volunteer at the organization
5. Because of your political or philosophical beliefs
6. Because of something that affected you or those close to you
7. Spontaneously in response to a need
8. Because of your religious beliefs
9. When you are asked
10. To receive a tax benefit

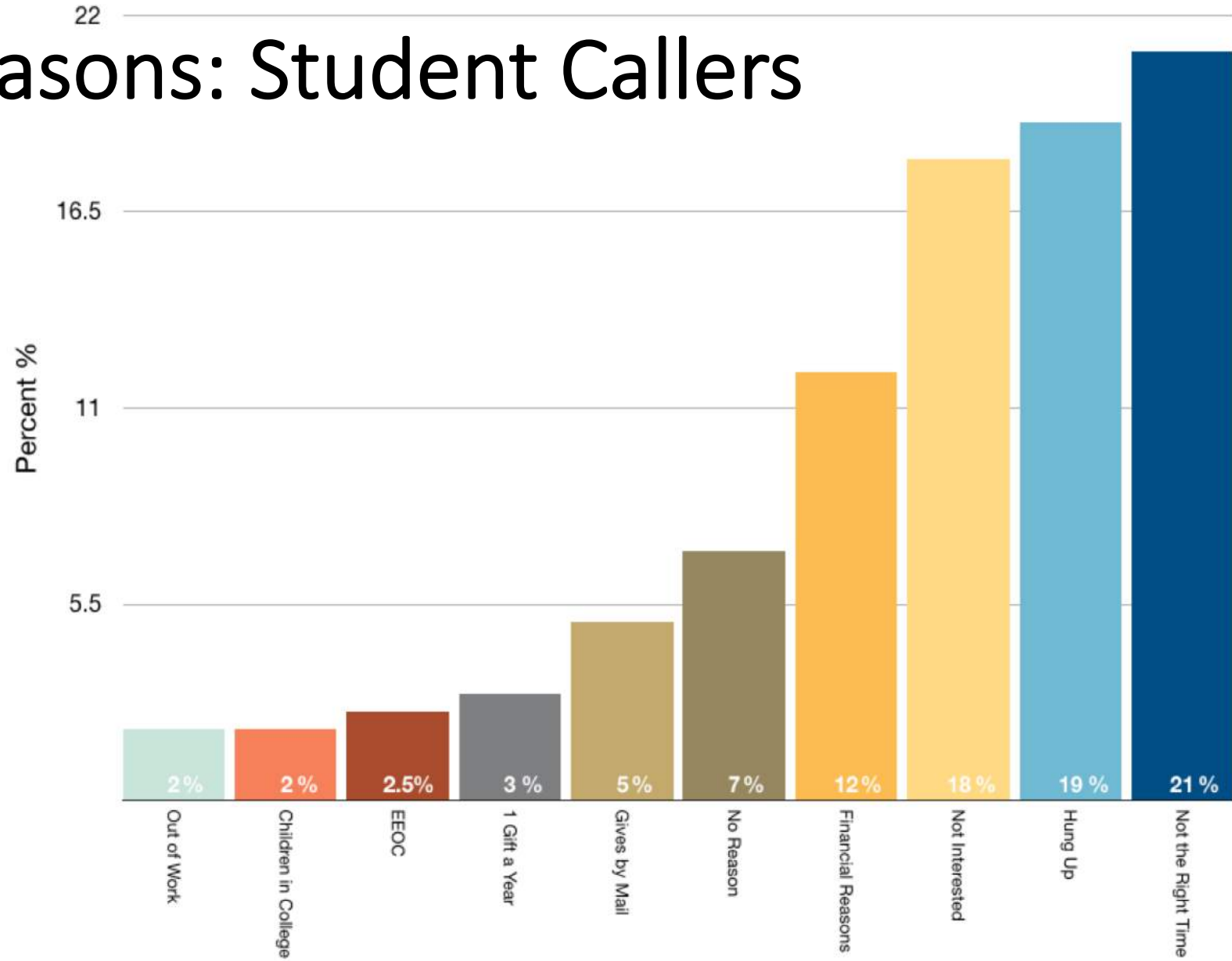
Refusal Reasons: Gift Officers



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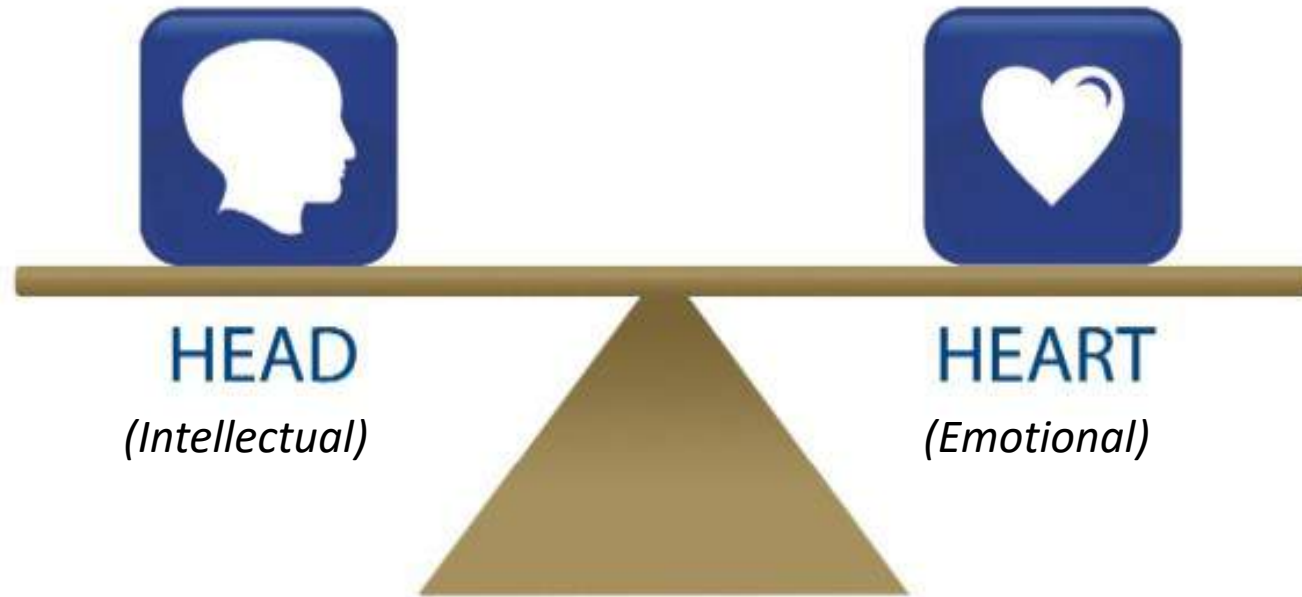
VOLUNTEERS *in*
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Refusal Reasons: Student Callers



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VOLUNTEERS *in*
PARTNERSHIP



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VOLUNTEERS *in*
PARTNERSHIP

My Tips

- Be prepared
- Have a plan, goal
- Make the case
- Listen
- Don't give up too easily

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VOLUNTEERS *in*
PARTNERSHIP

Excellence

Competition

Impact

Scale

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VOLUNTEERS *in*
PARTNERSHIP

Volunteer as Connector Volunteer as Influencer



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VOLUNTEERS *in*
PARTNERSHIP

Opportunities and Impact

- Philanthropy Ambassador
- George Eastman Circle Leadership Council
- Young Alumni Philanthropy Council
- Reunion Giving volunteer

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VOLUNTEERS *in*
PARTNERSHIP

Opportunities and Impact

- Challenger: class, affinity, Day of Giving
- Share your story: set the example and inspire
- 3-part giving: lead by example
- Plus 1: invite others to join
- Encourage participation on social
- List review: open doors and identify interest

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Your Impact as a Philanthropy Volunteer

- Share your passion as an ambassador for Rochester
- Identify, educate and ask others to show support
- Believe in the goals of the project and influence others
- Lead by example

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Ways to Participate



Virgil Joseph '01
Major: Mathematics
Occupation: Commercial loan officer,
Canandaigua National Ba

Fourteen years after grad
Lisa Joseph '02, wanted t
had given them so much,
child. Becoming George E
to them because they cou
five year period. Virgil als
Leadership Council and w
Engineering's 15th Reunio



Koji Muto '15
Major: Mechanical engineering and business
Occupation: Project development engineer at ExxonMobil,
Houston, Texas


Koji Muto always felt indebted to alumni who funded the
scholarships that allowed him to attend the University. Today,
he says he is "returning the favor" as a member of the
George Eastman Circle, Hajim Young Leadership Council,
and Houston Leadership Cabinet. "I encourage all alumni to
build on that connection to our alma mater, and make it ever
better." [Read more](#)

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Challenges: Raising the Bar


Tyler Kieft '09 | San Francisco, CA



WEST

"I feel very grateful to the University, and want other students to enjoy the opportunities and feeling of limitless potential that I did."


Walfrid Kujala '48E, '50E (MM) | Chicago, IL



"Growing up in the Depression, an Eastman School of Music education would have been out of reach without a scholarship. I received my freshman year."

MIDWEST

Gregory Corrado '14
Joseph and Debra Corrado P'14 | Boston, MA




"I am thankful for my parents' support and look forward to strengthening the student experience for current and future alumni."

NEW ENGLAND

SOUTHWEST


"We want to stay connected to Rochester, and enjoy meeting people at the Phoenix events. We can expand our knowledge and keep in touch."



Mickey Bortnick Leonard '67 and Jeff Leonard '67 | Phoenix, AZ

"The University of Rochester has served as a 'True North' for us over the years—literally and metaphorically. We want to give back and make a difference for others."


SOUTH



Russell Beyer '81S (MBA), P'05 and Lizzie Padro '82, P'05 | Miami, FL

MID-ATLANTIC

"I was born in Rochester, but after moving to New York City, I want to help students take full advantage of all the opportunities Rochester has to offer."



Armando Rivera '12 | New York, NY

THE REGIONAL ALUMNI CHALLENGE

Nothing fuels the competitive spirit more than a contest among friends. Or among fellow Rochester alumni. Add a strong sense of geographic pride, and you have a new and fun way to support the University of Rochester and its medical center.

The Regional Alumni Challenge separates Rochester alumni into six U.S. regions and pits them against each other in friendly competition, all in the name of creating meaningful impact through giving. Between now and June 30, alumni gifts of any amount to the University will count toward the Alumni Challenge and boost the giver's regional participation rate. You can meet some of the challengers right here (at left). Over the summer, the University will calculate the highest giving rate among the regions and announce the winner.

Want to help your region win the Alumni Challenge? Visit www.rochester.edu/giving/regional and take the challenge today!

DAY OF GIVING
CHALLENGE

MAY 3, 2016

Stephen Givant '81 is challenging the University community to make the second annual Day of Giving better than the first. This year, when you give, Stephen gives—up to a total of \$100,000.

Show your support for world-class education, research, health care, performance and other endeavors that cultivate the imagination. Every gift counts!

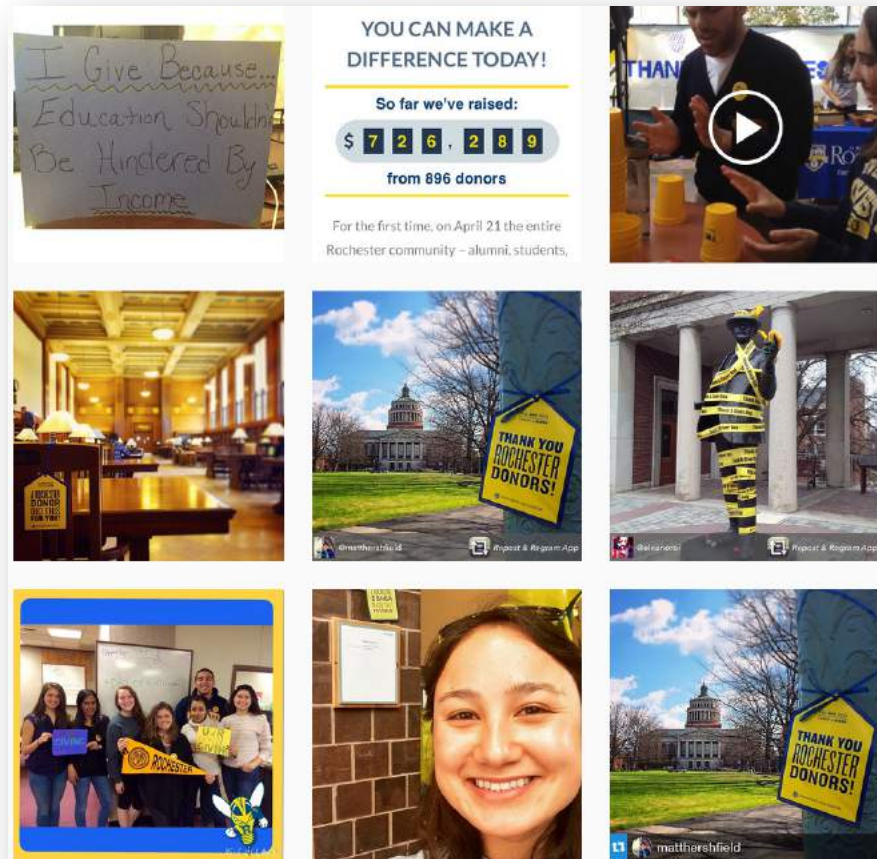
Learn more at rochester.edu/giving/day-of-giving

#URMakingADifference

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Social Media Ambassadors



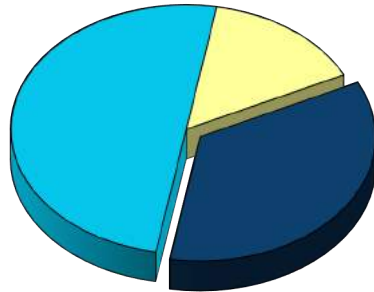
Ways to Participate



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Three-Part Giving



■ Annual Gifts

■ Special Gifts

■ Planned Gifts

- **Annual Gifts**
- **Special Gifts:** fund a project, commemorate a special occasion such as a benchmark reunion, or a campaign - assets
- **Planned Gifts:** by will or trust, designation of beneficiary of IRA, life-income gift such as a gift annuity or charitable remainder trust – ultimate gift

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5 Reasons Alumni Participation Matters

- Key to the long-term success of educational institutions
- Creates a broad and diverse base of support as well as a pipeline for the future
- Consistent alumni giving, in the years immediately following graduation, increases the likelihood of UR becoming a top philanthropic choice

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5 Reasons Alumni Participation Matters

- Our alumni participation rate is 1 of the 7 factors considered by U.S. News & World Report, and makes up 5% of the overall ranking—which affects reputation and enrollment
- High participation rates can inspire major donors, corporations, and foundations to increase their own support

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How can the University support Volunteers?

- Clearly identify priorities and goals
- Job descriptions
- Clear, frequent communication throughout assignment
- Tailored training, guidance and opportunities

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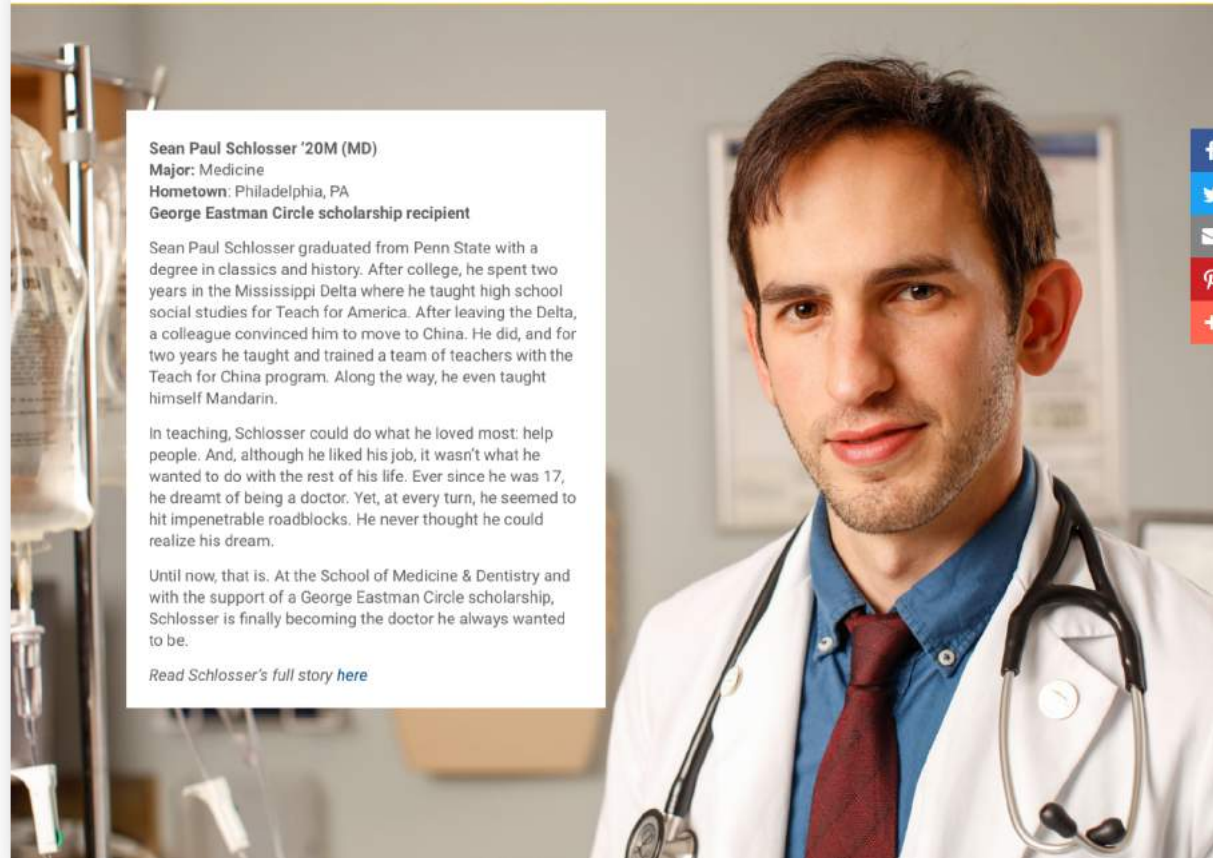
Sean Paul Schlosser '20M (MD)
Major: Medicine
Hometown: Philadelphia, PA
George Eastman Circle scholarship recipient

Sean Paul Schlosser graduated from Penn State with a degree in classics and history. After college, he spent two years in the Mississippi Delta where he taught high school social studies for Teach for America. After leaving the Delta, a colleague convinced him to move to China. He did, and for two years he taught and trained a team of teachers with the Teach for China program. Along the way, he even taught himself Mandarin.

In teaching, Schlosser could do what he loved most: help people. And, although he liked his job, it wasn't what he wanted to do with the rest of his life. Ever since he was 17, he dreamt of being a doctor. Yet, at every turn, he seemed to hit impenetrable roadblocks. He never thought he could realize his dream.

Until now, that is. At the School of Medicine & Dentistry and with the support of a George Eastman Circle scholarship, Schlosser is finally becoming the doctor he always wanted to be.

[Read Schlosser's full story here](#)

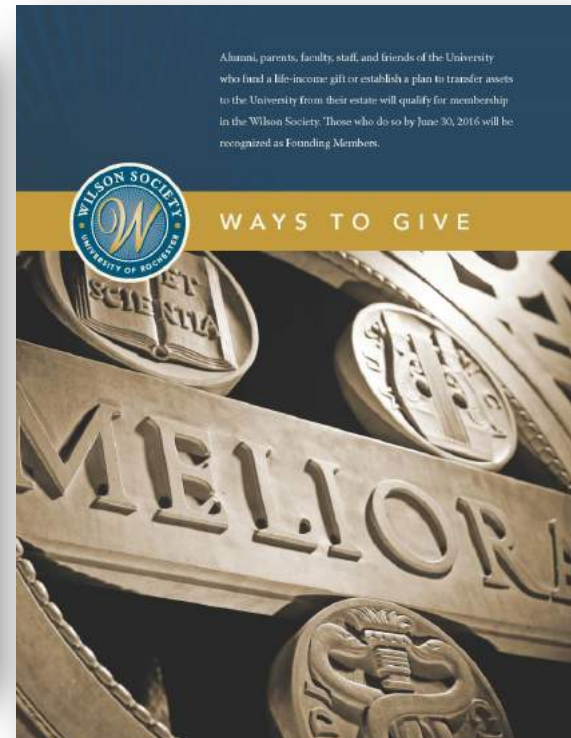
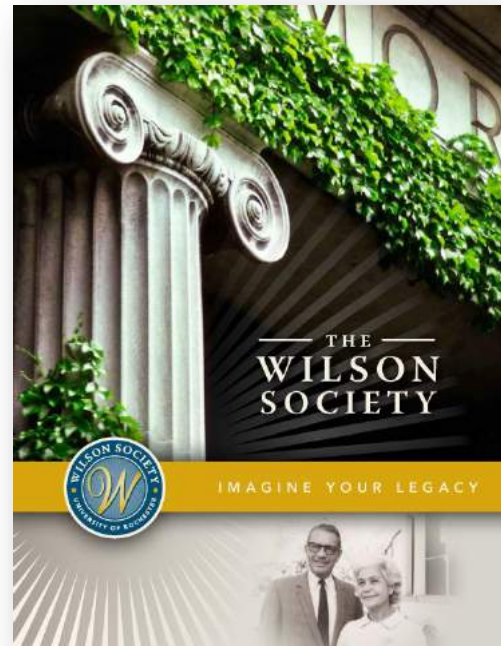


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IMAGINE YOUR LEGACY



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Real Estate




Create a Lasting Legacy: gifts of real estate

Dr. Brewster C. Doust '50, '52M (MD) honored his late brother's career and memory by gifting his lake-side home in Skaneateles, NY with a retained life estate. Mr. Dudley A. Doust '52 will be forever remembered with an endowment that will be established with proceeds from the eventual sale of the property.

Individuals who make gifts with a retained life estate enjoy:

- Life-long use of the property
- An immediate charitable tax deduction
- Removal of the asset from their taxable estate
- Eventual management of the property's sale by the University

For more information on gifts of real estate and other planned giving methods, contact the Office of Trusts and Estates.
(800) 655-4672 (585) 275-7547
Kraeckel@alumni.rochester.edu www.rochester.plannedgifts.org



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Volunteers as Partners

- Volunteers are **generous** and **willing to help out** when asked
- Sense of ownership through volunteering
- Best **advocates** for the cause are UR Volunteers
- Opportunities that **match your time and interest**

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We can not succeed without you



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experience

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Thank you Rochester donors for...

giving me a
beautiful diverse
exposure! ♡😊

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