



ADVANCEMENT

UNIVERSITY *of* ROCHESTER

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Why is Philanthropy Important to URMIC?

- Philanthropy can transform what we are able to do
- Provides support for people, programs, research and innovation
- In regards to research, grants need to be spent exactly as budgeted and don't allow to explore new ideas. Philanthropy can help bridge that gap.

How Advancement can help

Mission

Vision

Strategic Plan

Business Plan

Advancement
Plan

Philanthropy
Engagement

Your Center's funding priorities

- Aligned with Department's vision
- Flow from strategic plans
- Show evidence of relevance
- Demonstrate measureable outcome
- Resonate with donors

How do we find people with philanthropic interest?

Patients

- Life-changing or meaningful experience-positive or negative; big or small
- Your passion for what you do - clinical care, research, education

Community

- Advocacy groups, volunteers, events, media, friends, networking

Alumni

- SMD and Residents/Fellows

Cycle of Giving: A Practical Roadmap

Initial Contact



Additional Information



Identification



Values

Passion

Maybe

Priorities

Plans



If no,
recalibrate



Yes
Acknowledge



Your Involvement

Referral –
patient, alumni,
community
member

Share your
passion & vision,
participate in
donor visit

Understanding
and
Engagement

Maybe

Say thank you in
a personal way,
show impact-
how did the gift
help?

Dependent
on comfort
level & role

Ongoing
Care

Seeking the
Investment

Yes

If **no**,
recalibrate

Acknowledge

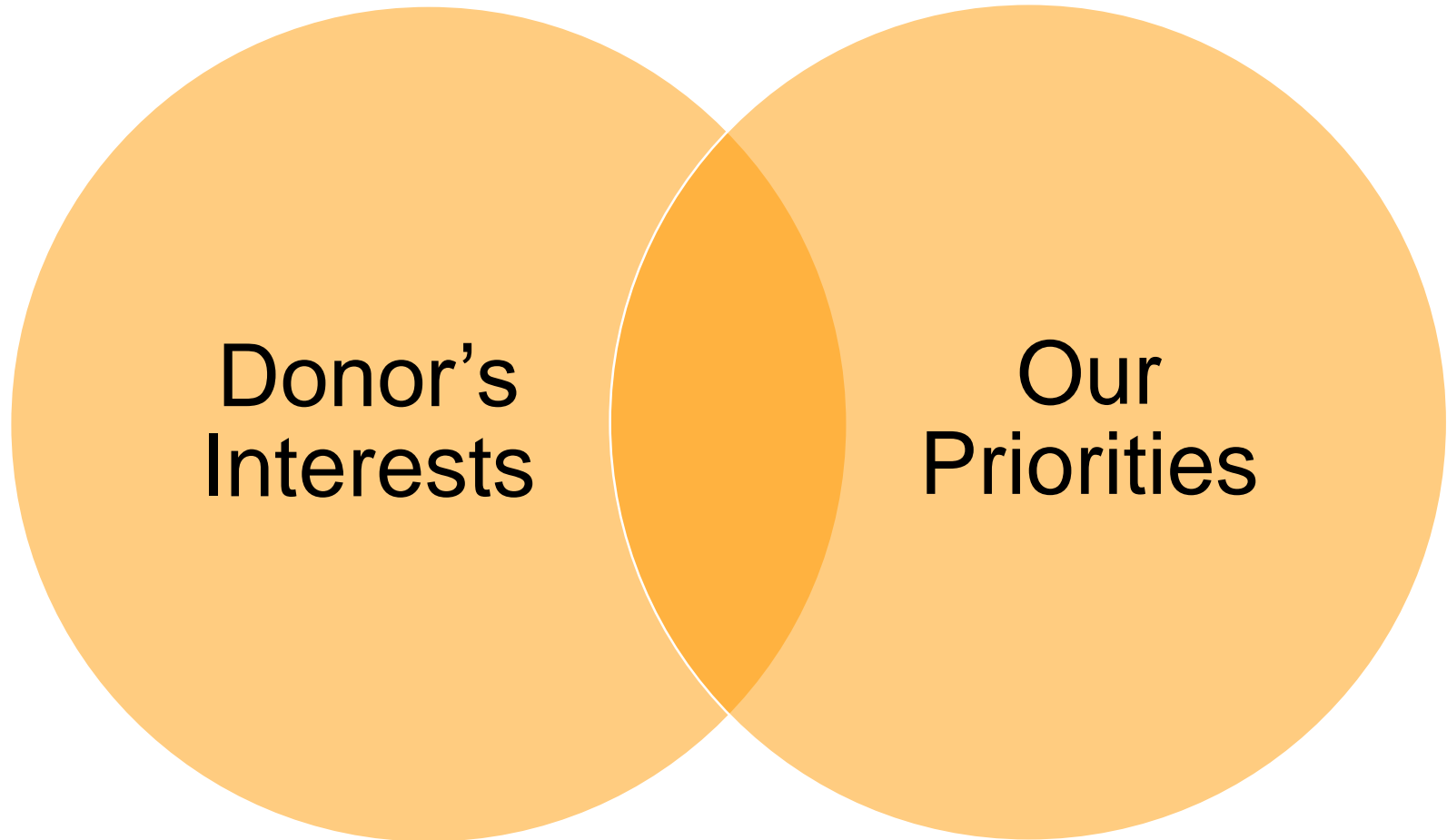
Finding the Connection

- What do they care about?
- Why do they care about that?
- What are they trying to accomplish with their philanthropy?
- What are you doing to address what they are trying to accomplish?

Asking Questions

- Ask open-ended questions
- Listen to their stories and look for underlying themes
- Confer with your Advancement colleagues about what they need to know to be ready to (eventually) make an ask

A Win-Win Scenario



Deepening Engagement

Varied types of interactions

- Meetings
- Activities
- Events

Volunteer opportunities

- Formal Groups
- One off opportunities

Thoughtful gestures

- Handwritten thank you notes
- Birthday cards
- Thought of you e-mails

Types of gifts

Current use

- Annual Fund
- Or, support specific project
- Use right away

Endowment

- Legacy
- Perpetuity
- 5% annual draw; grows over time

Deferred

- Estate plans
- Will
- Life Income gifts (CGAs/CRUTs)

Stewardship

Gifts of all levels are stewarded

Personalized stewardship plans

- Lunch presentations
- Tours
- 1:1 meetings
- Invitation to events

How you can help

- Develop your elevator speech in simple language
- Five Finger Messaging
- Introduce your Advancement colleague

Five Finger Messaging – Marts&Lundy

Where are we going?

Why does it matter?

Why are we the right ones to do it?

What will it take?

How can the listener
(potential donor) help?



Questions?