22 Fundraising Reminders for University of Rochester Volunteers

1. **Make your own commitment first.** Your personal commitment to the University of Rochester is a main motivating factor in obtaining gifts from others.

2. **Know your product.** Be thoroughly comfortable with the funding opportunities at the University of Rochester as well as general information about the institution. If you feel inadequately informed, be certain to team up with a staff member who can provide that information.

3. **Be positive.** If you have reservations about a specific project or program that you will be discussing with an individual, be certain that you get satisfactory answers in advance of the visit. Your attitude will affect the attitude of the prospective donor.

4. **Anticipate objections, deflections.** Your success will be enhanced if you are prepared to respond to objections or to deflect comments from the prospective donor that are not germane to the conversation. A staff member can be especially helpful in reviewing with you issues that have been raised by other prospective donors.

5. **Printed materials are helpful; you are essential.** People give to people. Your sincerity in representing the institution, and your belief in the University of Rochester as a cause worthy of support, is the most significant factor in a successful solicitation. Printed and other information supports your request, but does not replace it.

6. **Think about the three most important messages.** There are limits to that which a prospective donor can absorb in a meeting. By limiting your main messages to three, you can focus the individual’s full attention on the issues that are most important.

7. **Discuss your interests in the University of Rochester.** Speak specifically of your involvement in the institution as well as the factors that have motivated you to
support the institution. Your credibility as an advocate for the University of Rochester will be measured by how one perceives your level of passion for the institution.

8. **Ask open-ended questions.** Allow the individual you are visiting to open and to express feelings and attitudes about the topics you are discussing. Visits should encourage a dialogue, not simply a monologue.

9. **Listen.** “We hear with our ears; we listen with our minds.” Oftentimes, a prospective donor will express a point of view or feeling that is a critical piece of information in moving the relationship forward. Sensitivity is an important quality in listening and responding to other people’s points of view.

10. **Look for planned giving potential.** In addition to outright gifts, the institution is very interested in discussing other types of gifts with prospective donors. Both the University of Rochester and the individual can benefit from planned gifts. Refer interested individuals to the development office.

11. **Know methods of giving.** Be aware that the institution can receive gifts other than cash. Personal property such as art, jewelry, real estate and life insurance policies are welcome. Multiple-year pledges also offer opportunities for donors to increase significantly the size of their gifts.

12. **The University of Rochester needs both annual and capital support.** If one gives $25,000 in endowment – and suspends his/her annual gift of $1,500 in the process – the University of Rochester winds up further behind in the short term (the endowment will provide less than $1,500 in annual income). Operating support is a critical priority at the University of Rochester.

13. **Personal visits are essential.** National statistics suggest that personal visits result in a gift 70 percent of the time; telephone solicitations, 30-35 percent; and mail, less than 10 percent. When individuals are being asked to consider substantial gifts, they deserve the courtesy of a personal visit.

14. **Ask for a specific amount.** Again, it is a courtesy to the prospective donor to inform him/her of the amount that the institution is hoping that he/she will consider.
15. **After requesting the gift, be quiet.** Give the prospective donor time to consider the request you have made. Don’t talk past the closing. The more you say, the less obligated the prospective donor is to replying to your request. Give him or her a chance.

16. **Do your homework and follow up.** Your work doesn’t always end once you have made the request. If your prospective donor asks questions that require research and a subsequent response, ask the appropriate staff member for assistance – and get back to the prospective donor as soon as possible.

17. **Close the solicitation.** Complete the discussion. Get a commitment or a declination and thank the prospective donor. Don’t leave the request unresolved or hanging. If another meeting is required, arrange a date, time and place and close the gift at that time.

18. **Get pledges in writing.** It does not have to be a printed pledge card or letter of intent; any written pledge signed by the donor will suffice.

19. **Ask for help.** The staff is ready to assist in any way possible to facilitate solicitations and respond to questions and/or concerns that are raised by a prospective donor. Just ask for it.

20. **Volunteers make requests...prospective donors make decisions.** A volunteer should not measure his/her success by the size of the gift given, but by the quality of request made. We must always respect the right of the prospective donor to determine how high a priority the University of Rochester is in his/her overall philanthropy.

21. **There are no such things as large gifts or small gifts...except as they are perceived by the donor.** Please resist the temptation to judge someone else’s generosity. We cannot, and should not presume, to know all of the circumstances that bear on one’s gift decisions.

22. **JUST DO IT.** The most difficult part of asking for a gift is getting started. We tend to put off things until our schedule gets better – but it never does. Research and education are serious issues at the University of Rochester that require serious commitments from those who believe in them.