Gearing up for The Next Level
Introductions + Agenda

- Role of Volunteers
- Volunteers and Philanthropic Success
- Ambassadors in Gift Planning
- Ways to Participate
- Discussion + Next Steps
The Role of Volunteers

Stephen A. Dare P’13
Senior Associate Vice President of Advancement
A Nation Born of Volunteers

“These Americans are the most peculiar people in the world. You’ll not believe it when I tell you how they behave.”

“In a local community in their country, a citizen may conceive of some need which is not being met. What does he do? He goes across the street and discusses it with his neighbor.”
A Nation Born of Volunteers

“Then what happens? A committee comes into evidence and then the committee begins functioning on behalf of that need. And, you won’t believe this but it’s true, all of this is done without reference to any bureaucrat.”

“All this is done by the private citizens on their own initiative.”

- Alexis de Tocqueville, 1831
Why Are Volunteers Critical?

- You are knowledgeable about the University of Rochester and committed to our mission.
- You expand the University’s ability to engage, excite and solicit through peer-to-peer outreach.
- You inspire others through your example of leadership volunteerism and philanthropy.
What Does a Great Philanthropy Volunteer Look Like?

- Represent Rochester with passion
- Believe in the goals of the project and the plan to achieve them
- Become committed to, and engaged with, the initiative
- Lead by example
What Does a Great Philanthropy Volunteer Look Like?

- Identify, educate, and—when appropriate—solicit donors
- Work in a partnership with the development officers
- Support the advancement program throughout the initiative
How Can the University Support Philanthropy Volunteers?

- Staff presence
- Tailored training and guidance
- Job descriptions
- Clear, frequent communication throughout the assignment
Volunteers and Philanthropic Success

Brian Hendrick, Executive Director of Regional Advancement
The Meliora Challenge Success

- $1.3 Billion
  - (March 2016)
Volunteer Impact Most Evident...

- George Eastman Circle
  - 3,300 memberships

- Regional Campaigns
  - $457M

- Networks created across the nation
Volunteer as Connector
Volunteer as Influencer
Lessons Learned

- Sense of **ownership** through volunteering
- Volunteers are **generous** and **willing to help out** when asked
- Best **advocates** for the cause are UR Volunteers
Ambassadors in Gift Planning

Christopher Raimy, *Executive Director of Gift Planning*
Ways To Give

- Three-Part Giving
- Philanthropy First
- Commonly Gifted Assets
- Donor Stories
- The Wilson Society
Three-Part Giving

- **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
Gift Planning: Philanthropy First

- Assets
  - Cash
  - Stock
  - Real Estate
  - Life Insurance
  - Personal Property
  - Savings Bonds
  - Retirement Assets

- Method
  - Outright
  - Life Income Plan
  - Lead Trust
  - Testamentary

- Timing
  - Lifetime
  - Estate Plan

VOLUNTEERS in PARTNERSHIP CONFERENCE

UNIVERSITY of ROCHESTER
Will and Beneficiary Designations

Forever Part of the Ongoing Story

When I graduated, I knew I wanted to do something for the University because I was grateful for the scholarship that made my education possible. Decades later, when my husband and I were drawing up our wills, I decided to make a gift that would benefit students the way my scholarship helped me. I’m especially pleased that my scholarship bequest will help develop young people—I’m paying dividends in the lives of students who will have an impact on the world. It’s wonderful to know that this gift will forever make me a part of the ongoing story of the University of Rochester.

—Ann Wight, ’56 (MA), ’77 (PhD)
Ann served as director of admissions at the University of Rochester from 1977 to 1991. She is a member of the Texas Regional Cabinet and a volunteer leader in the UR Fairfield admissions program.

Imagine your legacy. Plan today to make it happen.

To learn more about bequests and other planned giving methods, contact the Office of Trusts and Estates. (800) 675-4672 • (585) 275-7947
kevcon@alumni.rochester.edu • www.rochester.giftplans.org

Volunteers in Partnership Conference

University of Rochester
Charitable Remainder Unitrust

Opening New Doors

"IN THE EARLY 70s, University leaders saw a new future for nurses. Because of their foresight, I was empowered to take my career beyond where anyone thought a nurse could go. I’m grateful for the doors that were opened by pioneers like School of Nursing’s founding dean, Lorena Ford. And when you’re grateful, you give back. That’s what I’m doing by making an estate gift to the School of Nursing. My scholarship fund will support future nurses who will care for countless patients and families. It’s a ripple effect, impacting generations we’ll never even know.”
— Nancy N. Stearns ’72, NP

Nancy established a charitable remainder unitrust, which is invested in the University endowment. The trust provides income to her now, and ultimately will become an endowed scholarship fund for students at the School of Nursing.

Imagine your legacy. Plan today to make it happen.

To learn more about life-income gifts and other planned giving methods, contact the Office of Trusts and Estates, (800) 635-6672 • (585) 275-5547
keckel@uol.rochester.edu • www.rochester.giftplans.org

University of Rochester
Testamentary Unitrust

Invest In What You Love

"WE'RE BOOMERS. We think we'll be around forever—but finalizing our estate gifts felt good," said Judy Ricker. Her husband, Ray, agrees. "It's a win-win for us and the University," he said. "We can provide for ourselves in retirement, our daughter, and the school we both love."

The Rickers' charitable remainder unitrust provides income for their family before creating three named funds at the Eastman School of Music—two professorships and one scholarship—that will be around forever. This is Ray and Judy's way of honoring Eastman's celebrated history and demonstrating their confidence in the School's future.

Judy's message to other boomers:
"Get on this bus! Join us and ensure the future of what you love most about the University."

Judy received her J.D. and J.M. degrees from Eastman and an M.B.A. from St. John's University. Ray received his J.D. from Eastman, where he served as student advisor, dean for professional studies, and a professor of constitutional law and inmate education. Institute for Music Leadership.

Imagine your legacy. Plan today to make it happen.

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lvecile@alumni.rochester.edu - www.rochestergiftplans.org

VOLUNTEERS in PARTNERSHIP CONFERENCE

UNIVERSITY of ROCHESTER
Charitable Gift Annuity

“My volunteer service is a commitment to VNS today. My charitable gift annuity is a commitment to its future.”

Ann Mulligan is passionate about caring for people. For more than fifty years she has delivered meals—and smiles—to grateful recipients of Meals On Wheels. Ann funded a charitable gift annuity to ensure VNS programs are available for future generations.

KEY FEATURES OF A CHARITABLE GIFT ANNUITY FUNDED WITH CASH
- Fixed income for life, a portion is tax-free
- An immediate charitable income-tax deduction
- A generous gift to the University to be used as you direct

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*Tax-free income for a period of years then the entire annuity becomes ordinary income.

We felt very strongly that we want to give others the opportunity we enjoyed at Rochester. When we were first starting out, we were realized in our careers that we were very well prepared and that our education at Rochester was of a very high quality. Our son John ’80 also passed this to his own years later, and his son, our grandson, Andrew ’11, is currently exploring his own University of Rochester experience.

Bob and Jane have expressed their appreciation for their Rochester educations in a number of important ways. Through a combination of annual, major, and planned gifts they have called their own personal legacy for the benefit of future generations of Rochester students.

- Charter Membership in the George Eastman Circle, following many years of loyal and generous annual fund support.
- A School of Nursing scholarship through a major gift at the time of Jack 43′s Reunion.

The College of Arts, Sciences, and Engineering - School of Medicine and Dentistry - Warner School - Simon School - Children’s Hospital of Strong - Strong Memorial Hospital - University of Nursing - School of Nursing - Highland Hospital - School of Medicine - School of Science - School of Education at the University of Rochester - Eastman School of Music - William C. Miller Chair

Philanthropy has always been a part of our success, and philanthropy always will be.
Real Estate

Create a Lasting Legacy: gifts of real estate

Dr. Brewster C. Dunst '50, '52 M.D. 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. Dunst '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
- Estate planning 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 Gifts.
(800) 657-6072 (585) 275-7587
Kathyjohnston@urmc.rochester.edu  www.urmc.rochester.edu
PAM MCQUILKIN LEWIS AND T.C. LEWIS

“My mother was fun-loving and spunky. She used to do things that would’ve horrified her if I did them—like ride a motorcycle. It’s because of my mother, Shirley McQuilkin, that my husband T.C. and I decided to support scholarships for nursing students and research on aging. We’re investing in the people at the University who can address serious issues facing the elderly. In addition to offering support today, we’ve planned for the future by making a bequest intention. My mom’s spirit lives on in our hearts. We’re glad to know that the gifts she inspired will live on as well.”

—Pam McQuilkin Lewis ’62 & T.C. Lewis ’62

ANN WRIGHT

Giving back through a scholarship bequest...

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The Wilson Society recognizes any individual (any age) who establishes an estate gift or pledge (any amount) for the University by:

- Will/Bequest
- Life Income Gifts
- Life Insurance
- Retirement Assets
- Real Estate-retained life use
- Outside Managed Trusts
- Realized Mature Bequests
Ways to Participate
Ways to Participate

- Philanthropy Committee
- George Eastman Circle Leadership Council
Ways to Participate

Your support can make all the difference.

Support Simon Scholarships and create opportunities for the world’s top talent.

"I work in Greece where the daily minimum wage is less than $23.00. I was in search of my true purpose in life. I received an MBA from Simon and it provided me with both the competitive advantage and the international exposure I needed."

Volunteers in Partnership Conference

University of Rochester
Challenges: Raising the Bar

EASTMAN ALUMNI CHALLENGE

It's Halftime!

The March Matchness Athletics Challenge is well underway and your UR varsity team needs YOUR support before time runs out!

Nathan Novosel '12 is challenging Athletics alumni to make a gift during the month of March, and the team with the highest percentage of alumni participation will receive $1,000!

What can $1,000 buy for your team? The funds can assist with new equipment, recruiting trips, or improved facilities. These upgrades will not only impact current athletes but also strengthen our programs for years to come!

Support the Friends of Rochester Athletics or your individual team with a gift of any amount and help your team move higher in the standings. Time is counting down, so make a gift today! Go Jackets!

Ready to take on the March Matchness Athletics Challenge?

Challenge Accepted

#MarchMatchness

UNIVERSITY of ROCHESTER
Thank Five

- Write a minimum of five “Thank You” notes to first-time donors to increase retention
  - Young Alumni donors
  - Rochester Loyal Young Alumni Donors
  - New George Eastman Circle Young Alumni Members

- Initially done twice a year, now a year-round activity due to success
Meet Five

- Meet a minimum of five new University of Rochester Young Alumni in your region to:
  - Help build relationships
  - Thank current donors
  - Help re-engage alumni with the University
  - Encourage donations of any size
Social Media Ambassadors

YOU CAN MAKE A DIFFERENCE TODAY!

So far we've raised:
$726,269
from 896 donors

For the first time, on April 21 the entire Rochester community – alumni, students,
stephen.dare@rochester.edu
bhendrick@admin.rochester.edu
craimy@admin.rochester.edu