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THANK YOU FOR SERVING AS A CLASS AGENT

Dear Class Agent:

Thank you for taking on a leadership role for your medical school class. Class agents are critical to successful reunions and to keeping alumni connected, informed and engaged. Your willingness to reach out to classmates to encourage Reunion attendance will lead to an incredible weekend of friendship and connections. And your help in guiding efforts to enhance your class legacy through a class gift will build a meaningful tradition of providing support to future generations of leaders and best.

We hope this manual will serve as a useful reference tool when speaking and interacting with your medical school peers. Please do not hesitate to contact us at any time should you have any questions or need further assistance. We have many resources and are ready to assist you in your efforts.

We look forward to working with you in the upcoming months and celebrating with you here in Ann Arbor. Go Blue!

Kind regards,

Gina Jennings
Director, Alumni Relations
MEDICAL EDUCATION AND ALUMNI RELATIONS CONTACT INFORMATION

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CLASS AGENT JOB DESCRIPTION

Role and Responsibilities
Every year the Medical School invites classes celebrating their five-year anniversaries to return to campus for Reunion. Class agents encourage attendance and participation, and they lead fundraising efforts for class gifts. The top priority: reuniting classmates with one another and with the Medical School.

As Reunion planning kicks off, you’ll be asked to help recruit additional class agents, make phone calls and send e-mails to classmates to invite them to Reunion, and share Reunion news and updates with your peers. When you come to Ann Arbor in the fall, you will attend group and class events and serve as a resource for others. Many classes maintain a high level of communication and interaction leading up to Reunion and during non-reunion years, which is often led by class agents. We encourage you to help your class stay connected in these ways.

In celebrating Reunion, another key role is to partner with fellow class agents to create a plan for making a class gift to the Medical School and encouraging full participation. Class fundraising is a great way for your class to honor one another and celebrate your achievements. These gifts will be recognized at Reunion, add to your individual class’s legacy at the Medical School, and build a tradition of supporting the students who represent the future of your field.

Because each class is unique, class agents work together to select a cause, program or fund that they feel will resonate with classmates. Many classes have opted to set a goal of establishing an endowed Medical School scholarship, for example. Other options include supporting student-led programs such as the Student-Run Free Clinic or Doctors of Tomorrow, purchasing a medical simulator for use by medical students, or supporting medical education in honor of a favorite faculty member. And while alumni are encouraged to make a contribution to their class gifts, they may also make a personal gift of their choice that will count toward their class’s goals for overall participation and dollars raised.

And remember: Our development staff will support you in all aspects of this endeavor.
CLASS AGENT PARTICIPATION TIMELINE & CHECKLIST

February-March

☐ Reconnect, Reaffirm, Rediscover and Remember:
  ▪ Take a moment and reflect on your medical school experience
  ▪ Get energized to make the reunion the best ever
☐ Through email or a conference call (Alumni Relations can coordinate your call arrangements), do the following:
  ▪ Divide class list between class agents
  ▪ Determine chair for class fund
  ▪ Set a goal for your class gift

April – May

☐ Review Reunion Class Agent Volunteer Toolkit
☐ Help recruit additional classmates interested in volunteering as a class agent; provide names to Therese Apostoleris (734-763-5279 or tmsapost@umich.edu)
☐ Work together to locate all classmates
☐ Begin contacting your classmates
☐ Keep other class agents informed of relevant class news you receive from peers
☐ Draft fundraising letter for class gift (partner with Alumni Relations to print and mail the letter with a response card)
☐ Register for Reunion starting 5/31/18; Reunion brochure will arrive in June
☐ Continue reaching out to classmates to encourage registration and gifts to the class fund
☐ Ask your classmates to start gathering photos, collecting memorabilia, recording memories, etc., to share/display during Reunion

June – August

☐ Make a personal contribution/lead gift to your class gift if you haven’t already done so, and share it to encourage others to participate
☐ All classmates should have received a first contact by class agents by June 15
☐ Class agents should be registered to attend Reunion by July 1
☐ Continue to contact classmates and encourage registration and participation in class fund
☐ Send personal thank you notes to classmates who have made gifts to the class fund

**September**
☐ Send personal “look forward to seeing you” notes to classmates attending Reunion
☐ Continue to share participation and total giving progress toward the class gift to drive full participation

**October – December**
☐ Attend Reunion weekend activities
☐ Connect with classmates and provide an update about the class fund at your class dinner
☐ Help to identify officers for your next class Reunion and submit to Alumni Relations by **11/15/18**
☐ Participate in post-Reunion activities:
  - Send updates to classmates on the progress of your class fund
  - Encourage classmates to continue giving to your class fund
  - Class giving counting period is July 1, 2017, through June 30, 2019
  - Encourage continued conversations between classmates after Reunion weekend
  - Encourage classmates to get together between reunion years
Thursday, October 4, 2018:

- 2018 Distinguished Alumni Awards Celebration
- Alumni Welcome Reception: a strolling dinner celebrating the 2018 MCAS Distinguished Alumni Award Winners

Friday, October 5, 2018:

- Faculty Presentations on Campus
- Reunion Luncheon
- Friday Afternoon in Ann Arbor: choose from an array of activities
- Emeritus Dinner: Sheraton Ann Arbor Hotel (bus transportation will be available to and from the Sheraton for activities throughout the day)

Saturday, October 6, 2018:

- Tailgate Celebration
- Football Game: Michigan vs. Maryland
- Victors Afterglow: Sheraton Ann Arbor Hotel
UNIVERSITY OF MICHIGAN MEDICAL SCHOOL BY THE NUMBERS

We've compiled some interesting facts for you to reference when talking to your classmates. Please feel free to contact us if you have any questions.

2017 INCOMING U-M MEDICAL SCHOOL CLASS PROFILE

- Number of applicants: 6,943
- Class size: 177
- Percentage women: 54.2%; percentage men: 45.8%
- Michigan residents: 39.5%
- Number who were U-M undergraduates: 52
- Number of undergraduate institutions represented: 76
- Percentage of underrepresented students in medicine: 19.2%
- Percentage of students who chose UMMS after being accepted at other top-ranked medical schools: 9.9%
- Average GPA: 3.77
- Average MCAT: 90th percentile
- Scholarship recipients in incoming class: 35.6%
- Number of scholarship awards given: 63

Class of 2017 Educational Debt

Average debt load of Class of 2017 graduating students:
- $141,191 (medical school debt)
- $155,667 (all educational debt)
MEDICAL SCHOOL GIVING OPPORTUNITIES

Here are just a few examples of how your class can make a difference for current students. Your Medical School Development partner can provide additional ideas and information.

CLASS SCHOLARSHIP FUNDS
Scholarship support for medical students is more important than ever. Several factors, including the increasing complexity of medicine and declining public funding, have driven up tuition costs. For an in-state medical student, the average annual expense at U-M totals more than $54,000. Out-of-state student annual expenses now approach $72,000 per year. Students today graduate from the Medical School with an average debt of $141,000. A scholarship gift is a wonderful way to relieve some of these debt burdens, freeing students to pursue whatever medical career they choose. Scholarships also enable us to attract the best and the brightest students, elevating the experience for all. Many alumni donors tell us that it was an honor to study medicine at U-M, and this is an opportunity to give back to an institution that had a significant impact on their careers as well as one that continues to instill excellence. A named endowed scholarship is a permanent fund that carries the name of the benefactor — in this case, your class year. Scholarships can be endowed for a minimum combined gift of $100,000. The fund will grow over time and support students in perpetuity.

PROGRAMS BENEFITTING STUDENTS
The Medical School hosts more than 60 student clubs and organizations, and each has a unique set of needs and achievement goals that may benefit from philanthropic giving. Your class may have been particularly involved or helped launch a student-run program and want to secure its future. Some of the programs your class may want to consider supporting include:

- **Doctors of Tomorrow**, in which medical students mentor freshmen from Detroit’s Cass Technical High School, aims to inspire and prepare teens from underrepresented communities to pursue careers in health care. Contributions are needed to operate and expand the program as well as to secure its future.
- We operate a **Student-Run Free Medical Clinic** in the town of Pinckney outside of Ann Arbor. U-M medical students coordinate preventive and primary care services to uninsured patients under the direction of faculty caregivers and supervisors. They also arrange for health education, specialty care and referrals. This year, the program reached nearly 500 patients and engaged more than 250 medical students. Contributions are used to pay rent, purchase supplies and ensure community members know about the clinic. Every gift will enhance medical training, address the problem of the uninsured, and most importantly, improve and save lives.
• Our Residency Education Travel Aid Fund provides stipends to students who need help covering the cost of attending interviews during a residency search. Fifty-eight percent of students surveyed by the Association of American Medical Colleges said financial considerations influence their decisions to attend interviews, which we believe can limit opportunities. Recipients are selected by the Office of Financial Aid.

CLINICAL SIMULATION CENTER
The Medical School is nearly doubling the size of our 6,000-square-foot Clinical Simulation Center, which houses adult, pediatric and infant patient simulators equipped with software and sophisticated electrical and mechanical features that realistically replicate human physiology and response to treatment. The expansion will provide more access to students at every stage of their training. We have added a suite of simulators that are available 24 hours a day, seven days a week, enabling students to practice heart, lung and eye examinations, airway management, and more. A gift of $10,000 to $50,000 would help us purchase one or more simulators for practicing skills such as physical exams and advanced procedures.

GLOBAL REACH
The University of Michigan is a leader in international health care. About half of our medical students engage in international activities through programs such as Global REACH, which facilitates and promotes our deep, sustainable international initiatives in research, education and health care. As medical students and residents learn to care for vulnerable populations in international settings, the knowledge and skills they gain inform the work they do here. Often, students are practicing with fewer resources and can no longer rely on technology. They must observe carefully, use fundamental medical skills and communicate effectively to make good medical decisions. Such immersion leads to creative insights, broader thinking and a more thoughtful approach to caring for patients of all backgrounds. Contributions to Global REACH help expand educational exchange opportunities, support student experiences related to global health disparities, enhance students’ skills in caring for people of all cultures, and help us attract students dedicated to making a global impact.
TIPS FOR SUCCESS

Step 1: Reconnect
Reconnect with classmates through phone calls, letters and e-mails. Reunion provides the opportunity to reconnect with the friends with whom you shared Medical School experiences. Help your classmates build excitement for attending Reunion by listening to the stories and memories they share. Call the classmates you know the best first — this will increase your level of comfort with the process. Invite your fellow classmates to reach out to the classmates they knew best as well.

Step 2: Reaffirm
Reaffirm your commitment to Michigan. Inform your classmates that you will be attending Reunion and supporting the class gift opportunity. Invite them to join you! Share with your classmates how important participating in the class fund giving program is for the Medical School and for the next generation of students. Reach out to your Medical School Development partner in making your gift, and encourage others to do so as well.

Step 3: Rediscover
Rediscover your class spirit. Instill a desire for your class to raise the most dollars and have the highest percentage of class giving among the Medical Schools classes.

Step 4: Remember
Consider sharing why you contributed to the class fund and encourage your classmates to contribute as well. Remember to thank them personally for their giving. A handwritten thank you note is a wonderful way to recognize their gifts.
HOW TO MAKE YOUR GIFT

There are many ways for you and your classmates to make gifts to the University of Michigan Medical School. Alumni celebrating their Reunion can contribute to their class gift by using the Reunion registration form that will arrive in June, as well as with the envelope and gift response card provided in their Reunion class fundraising letter. You and your classmates may make pledges, and you can work directly with a Medical School Development team member (see contact information on page 2). Gifts also can always be made online. To do so, please visit: www.alumni.medicine.umich.edu.

Personal checks may be made payable to:
"The University of Michigan"
Memo line: Class of XXXX Gift

Checks may be mailed to:
Michigan Medicine Office of Development and Alumni Relations
Attn: Gift Processing
1000 Oakbrook Drive, Suite 100
Ann Arbor, MI 48104

Stock transfers:
Julie Claudia, Securities Manager & GRA Liaison
734-647-7779
Development Services and Strategic Solutions
3003 S. State Street, Suite 900
Wolverine Tower
Ann Arbor, MI 48109-1288
umgiftsec@umich.edu
PLANNED GIVING INFORMATION

Bequests
By naming U-M as the beneficiary of an IRA, 501(k) or 503(b) or a percentage thereof, it will pass to U-M tax-free. Naming U-M as a beneficiary of a retirement account often requires little more than filing paperwork with your plan custodian.

Life Income Gifts
Charitable Gift Annuity (minimum gift $10,000)
A charitable gift annuity (CGA) is a simple contract between you and the University of Michigan. The CGA provides fixed, guaranteed income to you and a loved one for your lifetimes, starting now or at a future date of your choosing. The University of Michigan offers gift annuities to income beneficiaries beginning at age 50.

| Sample Annual payments for a $10,000 charitable gift annuity: |
|---|---|---|---|
| Age | Rate | Payment | Approx. Tax Deduction |
| 60 | 4.4% | $440 | $3,200 |
| 70 | 5.1% | $510 | $4,250 |
| 80 | 6.8% | $680 | $5,100 |
| 85 | 7.8% | $780 | $5,700 |

Charitable Remainder Unitrust (minimum gift $100,000)
A charitable remainder unitrust is established for and tailored to an individual’s circumstances. It holds assets and pays income either for life (for individuals aged 50 or older) or a term of years (to individuals of any age) to you or loved ones. A charitable remainder unitrust has the potential to grow over time, which can provide a hedge against inflation. Payout rates are determined on a case-by-case basis with a minimum equal to 5 percent. Trusts may be funded with cash or securities.

For additional information, please contact:
Jane Langeland, Director, Gift Planning
734-998-7587
jlanglea@umich.edu
Michigan Medicine Office of Development and Alumni Relations
1000 Oakbrook Drive, Suite 100
Ann Arbor, MI 48104
FREQUENTLY ASKED QUESTIONS ABOUT CLASS GIVING

What is a Reunion gift?
Classes often come together in their Reunion years to contribute to a class gift to the Medical School. These collective gifts make a meaningful impact on the Medical School and build a class legacy. They are recognized at Reunion. The gift counting period is July 1, 2017, through June 30, 2019.

What funds do Reunion gifts support?
Class gifts support the program or area that the class agents select. Gifts may be expendable or, if the total meets endowment minimums, endowed and named for the class.

How big do gifts have to be?
All gifts are important and have a tremendous impact, and every gift makes a difference! Classes that collectively give $100,000 or more can establish an endowed scholarship or named, endowed fund for the program of their choosing, which will provide support to students in perpetuity. Together, your class giving over the years will be very meaningful to the Medical School and future students.

Can gifts be made anonymously?
Yes, please have your classmate indicate this information when making his/her gift.

What is the cut-off date for making a gift?
Gifts and pledges made before October 1 will be counted toward the class goal and shared during Reunion, and gifts or pledges made between July 1, 2017, thru June 30, 2019, will be counted toward Reunion-year giving goals. Gifts may be made to expendable or endowed funds at any time, however.

Can classmates make estate and other planned gifts?
Yes! Planned giving is a method of supporting the University of Michigan that often combines current giving with long-term financial and philanthropic goals. For more information, please see the "Planned Giving Information" section of this toolkit or contact your Medical School Development partner.

Can I pay my gift over a period of time?
Yes! Many gifts are pledged over up to five years. You can work with your Medical School Development partner to set up a payment schedule that works best for you.
[Date]

[Name]
[Street Address]
[City, State Zip]

Dear [First Name]:

We hope this letter finds you well and looking forward to our XXth University of Michigan Medical School Reunion, October 4-6, 2018. It will be great to reconnect with classmates, the Medical School and the charm of Ann Arbor.

To commemorate the occasion, we’ve launched an effort to [establish a Class of XXXX Scholarship Fund] [or make a class gift to XXXXXXXXXX]. Our vision is to [assist future generations of University of Michigan medical students with the cost of the superb medical education] [describe what you hope your selection will accomplish].

We have set our goal at $XXX,XXX, which will make an important impact on future students. What better way to celebrate our XXth Reunion than with a class gift that will add to our legacy at the Medical School? As your class agents for this event, we hope you agree.

We have raised $XX,XXX toward the fund, with pledges ranging from $$$$ to $$$$$. Please consider joining us by making a similar donation. Making a gift now will help us reach our goal as quickly as possible. Pledges can be paid over five years. You can use the enclosed giving card and envelope, or feel free to contact our development partner, Therese Apostoleris, at 734-763-5279 or tmsapost@umich.edu if you have any questions about your gift.

Thank you in advance for your generosity. We are aiming for full participation, and a gift of any size will help us get there. We look forward to reporting the successful [establishment of the Class of XXXX Scholarship Fund] [achievement of our goal] at Reunion this fall. See you then!

Warmest regards,
The Class Agents/Include Individual Names & Email Addresses

P.S. Keep up with news and find out who is attending Reunion at alumni.medicine.umich.edu/reunion. Also follow up on Facebook: [www.facebook.com/UniversityofMichiganMedicalSchool/events](http://www.facebook.com/UniversityofMichiganMedicalSchool/events) or at #UMichMedAlum

P.P.S. When we reach our fundraising goal, these gifts may be used to establish an endowed fund. Distributions from the fund will be made in accordance with the university’s endowment distribution policy. Any surplus distributions during any period may be accumulated for later use for the above purposes or may be added to the principal of the fund for investment, at the university’s discretion.
Hi, <insert alum name>. This is <your name>. We graduated together from Michigan Medical School in XXXX.

- How are you doing?
- What have you been doing since we last saw each other?
- May I have your updated contact information?

<insert alum first name>, I’m serving as a class agent for our XXth Reunion this year. I hope you’re planning on attending in October. Have you registered?

- When is the last time you were back in Ann Arbor?
- Have you seen the newest additions on the medical campus?
- This is an exciting year – U-M’s bicentennial.

Yes, I’m attending:

<insert alum name>, I can’t wait to see you in October! I’m hoping we can get most of our class to return. We would love for you to reach out to the friends you were close with and ask them to come back, too!

I’d also like to make sure that you know about our class gift effort. I’m helping our class reach our fundraising goal of $XXX,XXX this year. Contributing is a great way for us to honor the Medical School, each other and to celebrate our own personal achievements. Is it OK if I ask a member of the Alumni Relations and Development team to contact you?

No, I’m not able to attend:

<insert alum name>, I’m sorry to hear you can’t make it back to this Reunion in October. Hopefully we will get to see you at the next reunion. Until then, would you consider honoring our XXth reunion year with a contribution to the class gift? We are aiming for full class participation, and it would be a great way for you to be involved even though you can’t attend. We are building our legacy at the Medical School and helping to make sure current and future medical students know that they have alumni support.
SAMPLE THANK YOU LETTER

Dear <insert alum name>,

Thank you for your generous support of our class gift in celebration of our XXth Reunion. It’s a great way for us to honor our class and our university. I look forward to seeing the impact our gift makes. The class of 19XX can accomplish great things! I hope to see you back in Ann Arbor in October as we celebrate our XXth Reunion.

<your name>, Class of XXXX

SAMPLE CASUAL FOLLOW-UP NOTE

Dear <insert alum name>,

It was great having a chance to catch up with you last week. I look forward to seeing you at Reunion in October! It will be exciting to get together with our classmates and reminisce. I hope you will continue to consider making a contribution to our class gift. Together, our class is capable of making an important difference for current and future students. Every gift matters, as we are aiming for full class participation. Let me know if you have any questions.

If we don’t talk before then, I’ll see you at Reunion.

Go Blue!

<your name>, Class of XXXX

(Remember, Alumni Relations will provide you with additional notecards upon request)
Thank you for serving as a Class Agent and helping to make this Reunion one of the best we've ever had!