



**Class Agent Volunteer Toolkit | 2022**

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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 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 growing your class legacy through a class gift will build a meaningful tradition of supporting future generations of the leaders and best.

We hope this manual will serve as a useful reference when speaking and interacting with your medical school peers. Please do not hesitate to contact us at any time should you have 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,

Therese Apostoleris  
Assistant Director, Alumni Relations





## MEDICAL EDUCATION AND ALUMNI RELATIONS CONTACT INFORMATION

Michigan Medicine  
University of Michigan Office of Development  
777 E. Eisenhower Pkwy., Suite 650  
Ann Arbor, MI 48108  
[medalumni@umich.edu](mailto:medalumni@umich.edu)  
[www.alumni.medicine.umich.edu](http://www.alumni.medicine.umich.edu)

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*Reunion Activities, Class Giving, and Class Agents*  
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## CLASS AGENT JOB DESCRIPTION

### Role and Responsibilities

Every year the University of Michigan 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.

As Reunion planning kicks off, you'll be asked to help recruit additional class agents, make phone calls, send e-mails to invite classmates, 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.

Another key role is partnering with fellow class agents to create a plan for 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 class legacy, and establish 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 they feel will resonate with classmates. Many classes set a goal of establishing an endowed Medical School scholarship, for example. Other options include supporting programs like 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. While alumni are encouraged to contribute to their class gifts, they may also make a gift of their choice that will count toward their class goals for 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

- 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 class agents; provide names to Therese Apostoleris (734-763-5279 or [tmsapost@umich.edu](mailto:tmsapost@umich.edu))
- Work together to locate all classmates
- Begin contacting your classmates — **all classmates should receive a first contact by class agents by June 15**
- Keep other class agents informed of 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 **5/31/22**; Reunion brochure will arrive in June
- Continue reaching out to classmates to encourage registration and gifts to the class fund
- Ask classmates to gather photos, collect memorabilia, record memories, etc., to share/display during Reunion

### June – August

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

### September

- Send personal “look forward to seeing you” notes to classmates attending Reunion
- Continue to share participation and class giving progress to drive full participation

**October – December**

- Attend Reunion weekend activities
- Connect with classmates and provide a class fund update at your class dinner
- Help identify officers for your next class Reunion and submit to Alumni Relations by **11/15/22**
- 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, 2021, through June 30, 2023
  - Encourage continued conversations between classmates after Reunion weekend
  - Encourage classmates to get together between reunion years

## REUNION WEEKEND TIMELINE

### **Thursday, October 13, 2022:**

- 2022 Distinguished Alumni Awards Celebration
- Alumni Welcome Reception: a strolling dinner celebrating the 2022 Michigan Medicine Alumni Society Distinguished Award Winners

### **Friday, October 14, 2022:**

- 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 15, 2022:**

- Tailgate celebration
- Football game: Michigan vs. Nebraska



## UNIVERSITY OF MICHIGAN MEDICAL SCHOOL BY THE NUMBERS

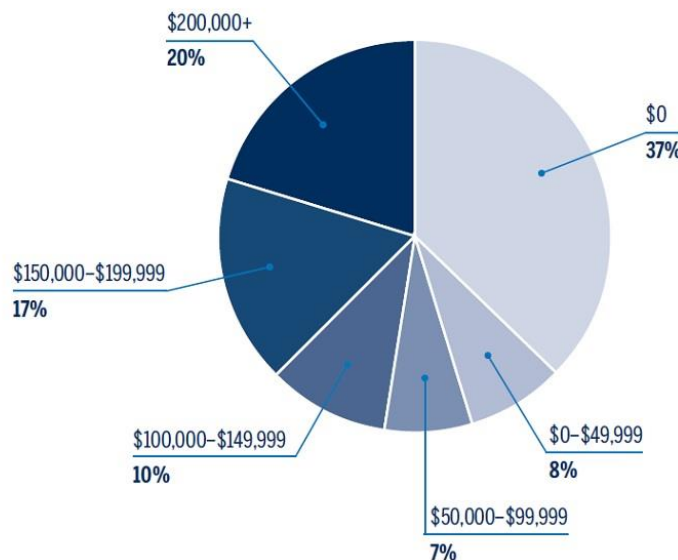
We've compiled some interesting facts for you to reference when talking to your classmates. Please feel free to contact us if you have any questions.

### 2021 INCOMING U-M MEDICAL SCHOOL CLASS PROFILE

- Number of applicants: **10,624**
- Class size: **170**
- Percent women: **61%**; percent men: **38%**; percent non-binary: **>1%**
- Michigan residents: **41%**
- Number who were U-M undergraduates: **47**
- Number of undergraduate institutions represented: **66**
- Percentage of underrepresented students in medicine: **21%**
- First generation students: **11%**
- Average GPA: **3.78**
- Average MCAT: **91st percentile**
- Scholarship recipients in incoming class: **70 (41% of class)**
- Number of scholarship awards given: **124 (includes partial scholarships)**

### AVERAGE DEBT OF 2021 GRADUATING CLASS

Average debt load of **2021** graduating students:  
**\$154,964** (medical school debt)  
**\$164,498** (all educational debt — illustrated in chart below)



## MEDICAL SCHOOL GIVING OPPORTUNITIES

*Here are a few examples of areas where your class can make a difference for medical students. Your Medical School Development partner can provide additional ideas and information.*

### **CLASS SCHOLARSHIP FUNDS**

Several factors, including the increasing complexity of medicine and declining public funding, have driven up tuition costs. Medical School students now graduate with an average debt of \$154,964. A scholarship gift is a great way to reduce debt burdens, freeing students to pursue whatever medical career they choose. A named endowed scholarship is a permanent fund that carries the name of your class. Scholarships can be endowed for a minimum combined gift of \$100,000. The fund will grow over time and support students in perpetuity.

### **DOCTORS OF TOMORROW**

U-M medical students mentor freshmen from Detroit Cass Technical High School, helping to inspire and prepare teens from underrepresented communities to pursue careers in health care. Contributions are needed to operate and expand the program and secure its future.

### **STUDENT-RUN FREE CLINIC**

Under the direction of faculty caregivers and supervisors, U-M medical students coordinate preventive and primary care services for uninsured patients. They also arrange for health education, specialty care, and referrals at the clinic in Pinckney, Michigan. Contributions are used to pay rent, purchase supplies, and ensure community members know about the clinic.

### **RESIDENCY EDUCATION TRAVEL AID FUND**

This fund provides stipends to help students cover the cost of attending interviews during a residency search. Financial considerations often influence students' decisions to attend interviews, limiting their opportunities. Recipients are selected by the Office of Financial Aid.

### **CLINICAL SIMULATION CENTER**

The center houses adult, pediatric, and infant patient simulators that realistically replicate human physiology and response to treatment. Gifts help purchase simulators and other resources for learners to practice physical exams, advanced procedures, and other skills.

### **GLOBAL REACH**

Contributions to Global REACH help expand international educational exchange opportunities, support 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. Help them 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 comfort with the process. Invite your classmates to reach out to the classmates they knew best as well.

### **Step 2: Reaffirm**

Inform your classmates that you will be attending Reunion and supporting the class gift. Invite them to join you! Share how important participating in class giving is for the Medical School and the next generation of students. Reach out to your Medical School Development partner in making your gift, and encourage others to do so.

### **Step 3: Rediscover**

Rediscover your class spirit. Instill a desire for your class to raise the most dollars and have the highest percentage of giving among Medical School 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 give to the 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 the envelope and gift response card provided in their Reunion class fundraising letter. You and your classmates may make pledges and can work directly with a Medical School Development team member (see contact information on page 2). Gifts can also be made online at [giving.medicine.umich.edu](https://giving.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  
777 E. Eisenhower Pkwy., Suite 650  
Ann Arbor, MI 48108

**Stock transfers:**

Julie Clauda, 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](mailto:umgiftsec@umich.edu)

**PLANNED GIVING INFORMATION****BEQUESTS**

A bequest is a transfer of property, such as cash, securities or tangible property, to an entity through a will or living trust. A beneficiary designation is similar to a bequest. Retirement assets, such as IRAs, make excellent bequests to the university. By designating U-M as the beneficiary of all or part of a retirement account, the full value of the gift is transferred income and estate tax-free. Naming U-M as a beneficiary of a retirement account often requires little more than filing paperwork with your plan custodian. You may also designate U-M as the beneficiary of your life insurance, donor-advised fund, brokerage, or bank account.

**LIFE INCOME GIFTS****Charitable Gift Annuity (minimum gift \$10,000)**

A charitable gift annuity (CGA) is a simple contract between you and U-M. 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. U-M 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	3.9%	\$390	\$3,100
70	4.7%	\$470	\$4,175
80	6.5%	\$650	\$5,000
85	7.6%	\$760	\$5,600

**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%.

**FOR ADDITIONAL INFORMATION, PLEASE CONTACT:**

Jane Langeland, Director, Gift Planning

734-998-7587 [jlangela@umich.edu](mailto:jlangela@umich.edu)

Michigan Medicine Office of Development and Alumni Relations

## 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, build a class legacy, and are recognized at Reunion. The gift counting period is July 1, 2021, through June 30, 2023.

### **What funds do Reunion gifts support?**

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

### **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. Your class giving over the years will be very meaningful to medical students.

### **Can gifts be made anonymously?**

Yes, please have your classmate indicate this preference 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 class goals and shared during Reunion. Gifts or pledges made between July 1, 2021, and June 30, 2023, will be counted toward Reunion-year giving goals. Gifts may be made to expendable or endowed funds at any time.

### **Can classmates make estate and other planned gifts?**

Yes! Planned giving is a method of supporting U-M 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 periods of up to five years. You can work with your Medical School Development partner to set up a payment schedule that works best for you.

## SAMPLE FUNDRAISING LETTER

[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 13-15, 2022. 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 XXXXXXXXXXXXX]. 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](mailto: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](http://alumni.medicine.umich.edu/reunion). Also follow up on Facebook: [www.facebook.com/UniversityofMichiganMedicalSchool/events](https://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.

## PHONE CALL TEMPLATE

Hi, *<insert alum name>*. This is *<your name>*. We graduated together from the University of 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?

### **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 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!**

