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Introduction & Overview

Dear Reunion Committee Member,

Harvard Medical School attracts and produces some of the best and brightest minds in the world. This is made possible, in large part, by the steadfast commitment and support of you, our Reunion volunteers. In addition to helping us reconnect with your classmates during this milestone year, you help to shape the unique learning experience for students by raising critical funds for everything from scholarships and financial aid to innovative research programs and world-class faculty. Simply put, you help HMS remain the premier medical school in the country and, for that, we are forever grateful.

We hope this manual serves as a useful reference when speaking with your classmates throughout your Reunion Gift Campaign. As always, please do not hesitate to contact us should you have any questions or need further assistance.

Thank you again for all that you have done and continue to do for HMS.

Sincerely,

Shaké

Shaké Sulikyan
Senior Director of Annual Giving

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Introduction & Overview

What is the Harvard Medical Alumni Fund?
Created in 1951, the Alumni Fund is a specific fund to which alumni are encouraged to give each year. Starting in July 2013, alumni have the opportunity to designate their gift to a specific area within the Alumni Fund. They may now direct their support to student scholarships, student research, educational facilities or provide Dean Flier the flexibility necessary to direct the funds where they are needed most by keeping their gift unrestricted.

Reunion Giving Campaign
Traditionally, the Reunion Classes present a special gift to the School and the Dean in honor of their Reunion. To facilitate this, each classmate is asked to “stretch” his or her normal giving compared to previous gifts, or give for the first time, in order to present a Class Gift that will have substantial impact on Harvard Medical School and its students. As you solicit and spread the word regarding your Reunion Gift Campaign, you serve as an ambassador for HMS and for the Harvard Medical Alumni Fund, providing information to educate your classmates as they consider supporting the Reunion Gift and, more importantly, sharing how HMS has impacted your own life and career.

Harvard Medical School Alumni Fund Mission
To secure annual gifts in support of HMS MD student.

“As HMS alumni, the best way for you to support our medical students and ensure their success as tomorrow’s medical leaders is to make an annual gift to the Alumni Fund.”
— Jeffrey S. Flier, M.D.
Dean of the Faculty of Medicine
Reunion Volunteer Checklist

As a Reunion Volunteer, you will be responsible for providing leadership and guidance for the fundraising efforts of the Reunion Gift Campaign. Your personal dedication, enthusiasm, and gift contribution are vital to increasing donors and financial commitments in recognition of this special Reunion year. As Committee members, you will play an important role in generating excitement and enthusiasm about your Reunion. We ask for your assistance in reaching out to your classmates to encourage attendance at Reunion events, submission of their Reunion Report entry and participation in the Reunion Gift Campaign.

Chart your progress throughout the Reunion program by using the following checklist of Reunion Volunteer responsibilities:

- Participate in Reunion Committee meetings/conference calls, to provide feedback about your Reunion activities and fundraising efforts, and receive updates from HMS staff.
- Review and sign, when necessary, all Reunion communications (i.e., letters and emails).
- Make your “stretched” Reunion Gift to the Harvard Medical School. Your reunion gift will serve as the example for your classmates to follow.
- Select a group of classmates to contact about Reunion activities, Reunion Reports and the Reunion Gift Campaign.
- Solicit 5-20 classmates for Reunion gifts, where appropriate, and report progress to the Reunion staff at ORD.
- Submit your Reunion Report entry.
- Attend Reunion activities.
Reunion Gift Policy

HMS has prioritized the Harvard Medical Alumni Fund as the preferred designation of Reunion gifts. Gifts allocated in this way provide a larger amount of funds with which to support current students.

Endowments

Endowment Minimums
Quad Professorship: $4,000,000
Scholarship Fund: $250,000

Should a class wish to create an endowed fund, the Medical School encourages the creation of an endowed scholarship fund. A minimum of $250,000 in gifts must be reached in order to endow this fund and therefore ensure its existence in perpetuity. In the event the class does not reach this minimum in commitments within the Reunion year, the gifts shall be redirected to the Harvard Medical School Alumni Fund in support of current-use scholarships. Regardless of final designation of reunion gifts, your class will receive recognition for its gift.

Pledges

- Pledges for a Reunion Campaign may be committed within a 12 month timeframe prior to June of the Reunion Year.
- Establishing a pledge prior to the Reunion year should not dilute the annual contribution one normally makes in non-reunion years.
- Payment of pledges of $5,000 or more may be extended over three years after the original pledge date, with the first payment made by June 30th of your Reunion year.

Life Income Gifts (annuities, trusts)

- Face value credit will be given for all life income gifts, provided they were established within five years of the Reunion.

Bequests

- Prior to your 50th Reunion: Bequests intentions will not be counted in Reunion totals.
- 50th Reunion and beyond: Members of the 50th Reunion Class and older classes can choose to support HMS with bequests and receive full credit in the Reunion Gift total.
- HMS will credit a bequest for the Class gift total when it meets the following criteria:
  - Requested minimum commitment of $25,000 (at least $20,000 from your estate and a $5,000 outright gift—payable by June 30th of your Reunion year).
  - Preferred designation of class scholarship fund, general scholarship, or unrestricted funding.
  - Signed bequest intention agreement and copy of provision in estate document for HMS.
Gifts and Recognition

Annual Gifts
Annual gifts strengthen the Medical School's ability to help students achieve their potential and maintain its standing as the premier medical school in the country. Every gift makes a difference and the most common annual gifts are made to the HMS Alumni Fund. Together, donors to the Alumni Fund have an important impact as they help to shape the experience for nearly every HMS student by providing scholarships and financial aid, supporting our educational facilities, and teaching innovations through their annual giving.

Stretch Gifts
Stretch gifts are termed as such because they encourage donors to reach beyond their normal giving capacity to make a significant contribution. HMS asks alumni to make stretch gifts during their Reunions, but anyone can make a stretch gift anytime they feel inclined. While the timing still mirrors the HMS fiscal year, donors may fulfill their pledge of $5,000 or more over the course of three years.

Major Gifts
Major gifts come in many different forms as people give to HMS for a variety of personal reasons. Fellow alumni, like you, often want to give back to the Medical School for the impact it has had on their lives and careers, or because they want to make a difference—in a student’s life, in a program, or through supporting Dean Flier’s goals. Whatever the reason, donors want to see their gifts make a significant contribution, and the ORD staff is here to help maximize the potential of every gift.

Amphitheater Chairs
With a $10,000 gift payable over two years, this exclusive opportunity allows individuals to name a chair in the prestigious the Joseph B. Martin Conference Center Amphitheater, located at the heart of the HMS campus. Each chair features a personal inscription on a 2” x 4” brushed steel plaque, and 100% of every gift made is dedicated to helping current and future HMS students by supporting scholarships and financial aid. In addition, all participants in this program receive full class credit towards their Class’ Reunion Gift efforts.

Planned Gifts
Planned Gifts encompass a way of giving that helps donors balance their personal financial goals and charitable interests while realizing significant tax benefits.

Life Income Gifts: In this arrangement, a donor irrevocably contributes cash, appreciated securities, or other property to HMS. The Harvard Management Company (HMC) then manages that donation and pays the donor and/or a beneficiary an annual income for life or a specified term of years. After the death of the last beneficiary or the term’s end, the remainder of the donor’s gift is transferred to HMS. The proceeds of the donor’s gift are used for the purposes he or she designated at the time of his or her contribution.

Benefits include:
- Annual income for a donor and/or beneficiary.
- Professional investment management at no charge by the HMC.
- Favored capital gains tax treatment.
- Immediate federal income tax charitable deduction.
- Estate tax savings.
- Creating a future gift that makes a difference at HMS.
Gifts and Recognition

Charitable Gift Annuity: A charitable gift annuity is a simple contract between a donor and Harvard Medical School: in exchange for an irrevocable gift, Harvard will pay the donor an annual fixed income for life. The annuity is backed by the assets of the University, and up to two individuals may receive income for life. In addition to receiving a guaranteed income, the donor is eligible for a charitable income tax deduction, and may also name the area at Harvard Medical School that will ultimately receive the benefit of his or her gift.

Pooled Income Fund: Similar to mutual funds, gifts to one of Harvard's pooled income funds entitle the donor and any beneficiary he or she names to a pro-rated share of the fund's income for life, in addition to an income tax deduction.

Charitable Remainder Trust: A Harvard-managed charitable remainder trust is an excellent way to generate variable lifetime income for the donor (and another person, if named). The donor will qualify for a charitable income tax deduction for a portion of the value of his or her gift. If the donor funds a trust with an appreciated asset—such as stock—he or she can entirely avoid the capital gains tax which otherwise would be due had the asset been sold outright. Harvard Management Company will manage the trust at no additional cost to the donor. The minimum funding level is $100,000. The donor can add to the unitrust at any time with a minimum gift of $10,000. HMC can invest the trust in units of the Harvard endowment. Alternatively, the trust can be invested in a group of mutual funds for a tax efficient income.

See the diagram on page 9 to see how these gift types are structured.
How it works

You transfer cash,
You receive an income
HMS pays a fixed portion of these payments
When the gift annuity
Gifts and Recognition
Other popular planned gifts:

Bequests: A charitable bequest allows donors to give various assets to HMS through a provision in their wills or estate plans. The bequest is deductible for federal estate tax purposes and, in general, bequests are not subject to state inheritance or estate taxes. The HMS Gift Planning Office will happily provide sample language for your will or estate plan.

Retirement Gifts: By naming HMS the beneficiary of a retirement account or percentage thereof, it passes to HMS tax free. This contrasts with upwards of 75% of the plan’s assets being lost to taxes if left to a donor’s children. Changing your IRA designation to name HMS as a beneficiary often requires little more than filing paperwork with the plan custodian. The HMS Gift Planning Office will happily provide further information.

Personal Property: In planning a donor’s estate, it is important that he or she remember that property including works of art, antiques, stamp and coin collections, and jewelry may be subject to estate taxes. Should a donor wish to donate this type of property to Harvard Medical School during his or her lifetime, he or she may reduce his or her taxable estate, as well as qualify for an income tax deduction.

Real Estate: A gift of real estate can be an attractive way to make a substantial commitment to Harvard Medical School while realizing important tax and income benefits. A donor may be able to significantly reduce his or her income taxes, capital gains taxes, and estate taxes, while possibly earning an income from his or her gift. Types of real estate that can be suitable for a gift include: a personal residence, vacation home, farm or ranch, commercial property, building lot, agricultural land, and undeveloped or unimproved land.

Charitable Lead Trust: Once a donor transfers assets to a lead trust, the trust pays a percentage of its value to Harvard Medical School each year of its term for purposes designated by the donor. When the trust ends, its remaining principal passes to the donor’s family.
Donor Recognition Societies

Dean’s Council

Dennis’s Council benefits include:

- Invitations to and preferred seating, when available, at HMS events
- Recognition in the Honor Roll of Donors
- Dean’s Council USB flash drive

Ezekiel Hersey Council

Ezekiel Hersey Council benefits include:

- Invitation to the Council’s annual dinner at HMS, and other School-wide events
- Information on current HMS research
- Recognition in the Honor Roll of Donors
- Ezekiel Hersey Council welcome gift

Dean’s Council

More than twenty years ago, Harvard Medical School established the Dean’s Council Gift Society to recognize the importance of alumni and friends of the School who make an annual commitment of $2,000 or more during the fiscal year. The advocacy of these individuals dramatically helps to advance the mission of Harvard Medical School, making it possible to educate the leading doctors of tomorrow and sustain groundbreaking research today. Every gift adds value and provides the Dean flexibility to champion areas of greatest need—most notably, scholarship support.

Each year, the Medical School honors its Dean’s Council members by publishing their gifts in the annual Honor Roll of Donors, and engaging them in the life of the School and our students throughout the year.

To learn more about becoming a member of the Dean’s Council, please contact Shaké Sulikyan, Senior Director of Annual Giving, at 617-384-8454 or shake_sulikyan@hms.harvard.edu

Ezekiel Hersey Council

In 1770, Ezekiel Hersey made a bequest of £1,000, which led to the establishment of Harvard Medical School. Through his single generous act of giving, he helped found a medical school that would one day become world-renowned for its physicians, researchers, and medical leaders. He left a truly remarkable legacy. In so doing, he not only became the Medical School’s first benefactor, he also became its first “planned” giver.

Today, alumni and friends who make a bequest provision or other life income gift to HMS become members of the Ezekiel Hersey Council. Members receive an invitation to the Council’s annual spring dinner at the Medical School, information on current research, recognition in the Dean’s Report, and invitations to other School-wide events.

To learn more about becoming a member of the Ezekiel Hersey Council, please contact Mary Moran Perry, Senior Director of Gift Planning, at 617-384-8449 or mary_perry@hms.harvard.edu
Making the Case
You likely have a firm understanding of your own reasons for contributing to the Alumni Fund. While these beliefs and convictions are uniquely compelling for you, it is also important to understand the views of other HMS alumni in order to effectively inspire them to give.

Members of this spring’s graduating class face an average student debt of more than $100,000.

Thanks, in large part, to gifts made to the Alumni Fund, the good news is that HMS:

- Recognizes the effect debt has on students’ lives;
- Provides strong financial aid packages;
- Is taking steps to limit student debt.

However, the bad news is that the School must accomplish considerably more if we hope to make a tangible difference in the debt levels of our students.

What are the facts?
The cost of attending HMS is now $81,725 per year, of which tuition accounts for $52,100. More than 80% of the students avail themselves of loans and scholarships, and the average student debt for the Class of 2013 was $104,107 upon graduation. Additionally, HMS scholarship and financial aid is not fully-funded. In fact, 25% of the HMS financial aid budget comes from current-use monies, such as annual gifts made by alumni, which allow Dean Flier to continue the Medical School’s need-blind admission policy.

Why is student debt a problem?
Entering a medical career encumbered by large debt undermines many students’ commitment to service by creating disincentives to choose underpaid specialties, including primary care, to practice in underserved communities, and to pursue academic careers. This jeopardizes the spirit of medical professionalism and service that Harvard aspires to engender in its graduates.

How does Harvard’s financial assistance package compare?
Student debt at Harvard is less than at many private medical schools, but some institutions do much better. For example, the average indebtedness per student at one school is almost $30,000 less than at HMS.

Why can’t Harvard draw more scholarship funds from its endowment?
Use of the Harvard endowment is largely restricted to designated programs and endowed professorships; each school also gets a portion of the unrestricted endowment each year. Appeals to the Harvard Corporation for one-time increases in this payout are rarely honored, and, if they are, then only for a single year. Increased support for scholarships would require perpetual disbursements, which have never occurred.

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Making the Case

What steps has HMS already taken?
Despite a tight HMS budget, Dean Martin approved lowering the unit loan from $25,000 to $24,500 for the class entering in 2006. This was the first unit loan reduction in nearly ten years.

What is being done to reduce student debt?
In 2008, Dean Flier and the HMS Financial Aid Committee eliminated the need for a parental contribution for families with annual incomes of less than $120,000. Steps to reduce the unit loan are being looked at. But reducing the unit loan is expensive; each $5,000 decrease would require an annual income of $1.5 million or new endowments of $40 million.

Why should alumni care about student debt?
First, we would like all qualified students to be able to attend Harvard, regardless of financial status. Second, we want to encourage all HMS graduates to pursue the career tracks in which they could make the greatest impact, irrespective of financial constraints. Finally, because Harvard is an important medical trendsetter, we believe that improving the debt situation at HMS could reverberate nationally.

What can alumni do?
You can continue to give generously to the Alumni Fund, knowing your contributions will ease the financial burdens of current and future medical students. In fact, gifts from HMS Alumni provide the single largest source of new scholarship support for students. You can also look for opportunities to identify new funding sources and be attentive to donors who are not HMS graduates, but who may be inspired anyway.
Solicitation Tips for Making “The Ask”

As you may know from your own experience, the solicitation process varies with the scale of the “ask.” The interaction involved in soliciting a $25 annual gift may differ substantially from the solicitation of a $25,000 annual gift. The preparation, timing, and complexity of these gifts differ, and must be considered carefully. However, the solicitation process can be distilled into five primary steps.

Five Steps in a Solicitation

**Step 1:** Reconnecting with your classmate
**Step 2:** Stating the purpose of the meeting/call
**Step 3:** Telling the story and making the case for supporting HMS
**Step 4:** Making “The Ask”
**Step 5:** Following-up with your classmate

**Step 1: Reconnecting with your classmate**
Reunion is an opportunity to reconnect with old friends and classmates. As such, take the chance to ask questions and learn about what’s been going on in the lives of your peers, both professionally and personally. Although you do have information to share, listen to your classmate and let he or she set the pace. In doing this, you help to build excitement and enthusiasm for Reunion and returning to HMS.

**Step 2: State the purpose of the meeting/call**
When speaking with classmates, be upfront as to why you’re calling. Try using sample statements, such as:

- “I’m on our Class’ Reunion Committee and am calling to update you on our plans for Reunion and to ask for your involvement.”
- “You have been a generous supporter in the past. I’d like to plant the seed for you to do something even more extraordinary for our Reunion this year.”
- “As a Class, we are trying to do something special for the current students at the occasion of our Reunion. We need your help.”
Solicitation Tips for Making “The Ask”

Step 3: Tell the story and make the case for supporting HMS
Review all materials provided to you by HMS staff regarding the School and the Harvard Medical School Alumni Fund as they include information useful in helping make the case to your classmate. Also, be mindful of your own reasons for contributing to the Harvard Medical School Alumni Fund/Reunion Campaign. Chances are good that your classmate feels as strongly about your Reunion Campaign as you do.

Step 4: Making “The Ask”
Always begin on a personal note, but remember to get to the point of the discussion quickly. Do not be aloof as to your ultimate reason for visiting/contacting them. Most importantly, always ask for a specific amount—you never know how much he or she is capable of giving until you ask. Try using sample statements, such as:

- “I have made my special Reunion gift and hope that you’re willing to join me and the rest of our classmates by making a gift of $X.”

- “The current students need your help. Would you consider a gift of $X in support of scholarships?”

- “You’re a leader in our Class, can we count on you to step up again with a gift of $X?”

Step 5: Following-up with your classmate
If your classmate makes a commitment, thank him or her on behalf of your Class and the School and notify the appropriate HMS staff contact. See staff contact info on page 3. In addition, follow-up your call/visit with a personal thank you note/e-mail, and reiterate any monies pledged or proposed in order to move the process along. You can also feel free to write your own note and forward a copy to the Annual Giving staff.

Should your classmates decline the solicitation, ask for the second amount provided to you by the HMS staff, or ask for a participation gift.

If your classmate is still considering the proposal, utilize the Annual Giving Team for follow-up efforts. Feel free to ask them when would be best for you to revisit the conversation.

“I don’t need an answer now. When is a good time for us (me or Annual Giving) to revisit this?”
Solicitation Tips
Before you meet or call

- Make your own gift first. Your solicitation will carry far greater weight if you have made your own meaningful gift commitment.

- Review all materials provided to you by the staff regarding HMS and the Harvard Medical School Alumni Fund.

- Review any personal information regarding your classmates that may assist you in your solicitation. A solid grounding in each person's history will help you form the best solicitation strategy.

- Be assured. Don't underestimate the responsiveness of any classmate on your list. Chances are good that he or she feels as strongly about your Reunion and HMS as you do.

- Be confident. You don't have to answer every question a classmate has at this stage. Their questions will help you understand their special philanthropic interests, and the Annual Giving staff will work with you to provide the right answers to your follow-up conversation or meeting.

The meeting or the call

- Keep in mind that face to face interactions have the greatest effect. By arranging a more lengthy conversation, you will be able to make your case more effectively.

- Call the classmates that you know the best first – this will help increase your level of comfort with the process.

- Via telephone, e-mail or letter, schedule a meeting to discuss the needs of the Medical School face to face. Otherwise, conduct the solicitation over the telephone.

- If a classmate is reluctant to meet, address his or her concerns with information in the manual and from your own experience. Suggest a meeting to discuss these concerns further and why support of the School is so important. Remember, if unable to answer, please contact the Annual Giving staff.

- “In some instances, a person may be harboring resentment that has been building for years and years and which has prevented them from giving. That same person is often pleased and relieved to get that 20-year-old weight off his or her chest and finally laugh about his grievance and smile at himself and delightedly become a participant in the HMS family once again.”

—Albert Crum, MD ’57—
Solicitation Tips

The meeting or the call (cont.)

- Take your time. Do not hurry your presentation. Point out the items that you perceive as being of particular interest to your classmate. Create rapport. Develop interest. Seek opinions before actually asking someone to consider a gift.

- As you talk to your classmate please let him or her know that his or her help on the Reunion Committee is welcome. At any time up until late May he or she may be just the right person to solicit someone for whom we had no prior good contact.

The Solicitation

- Make the Reunion Campaign message of “generating student scholarship” your message.

- Always begin on a personal note, but remember to get to the point of the discussion quickly. Do not be aloof as to your ultimate reason for visiting.

- It is important to be personal and explain why you think the Reunion Gift is significant.

- Offer the School’s financial needs if necessary.

- Discuss reasons for giving to the Harvard Medical School Alumni Fund.

- Ask questions that steer a positive course, and you will elicit a positive reply. You set the tone of the conversation.

- Be direct: Discuss gift amounts already reported to the class or raised by the committee; this may help to raise your classmate’s sights.

- If your classmate has given in the past, thank him or her and encourage him or her to increase his or her giving level, particularly as it is a Reunion year.

- Ask for a specific amount. Your staff contact will provide a suggested ask amount. Stay positive. Mention your own intentions to give. “This year the class is trying to stretch their giving. I hope you will consider a gift of $____?” Consider how you would like to be asked.

- Listen; don’t expect an immediate commitment for a large gift. Your classmate may need time to think it over or consult with others.

- Inquire about the possibility of matching gifts through one’s employers. Classmates receive class credit for both their pledge and the corporate match.
Solicitation Tips
The Solicitation (cont.)

- Also inquire about planned gifts (i.e., trusts, bequests, etc.).

Should a classmate respond unfavorably to the outright ask amount, a planned gift might be the right fit for them. The below questions were crafted for you, as solicitor, to generate interest in planned gifts. A HMS staff contact can then work with the classmate to more fully explore their planning concerns and interest in supporting Harvard Medical School in this way. Consider the following scenarios when speaking with classmates:

**Scenario** – If donor states that he/she cannot make an outright gift because of cash flow, a possible follow-up question might be: “Have you included (or thought about including) HMS in your estate plan?”

**Scenario** – If donor states that they are taking care of a family member, and, therefore, are hesitant to make outright gift, a follow-up question might be: “Do you know there are gifts that can provide income for your family now and HMS later?”

**Scenario** – If donor states they cannot make a gift until property sells, a follow-up question might be: “Do you know a portion of property can be contributed to HMS for a special gift arrangement?”

In general, the question below can sometimes get at the fact that a life income gift might be right for them: “What would you like to accomplish with your gift?”
Solicitation Tips
The Close

- If your classmate makes a commitment, thank him or her on behalf of the School and notify the appropriate HMS staff contact. See page 3 for contact information.

- If your prospect is not ready to make a commitment, schedule a follow-up appointment or telephone conversation allowing for a week of consideration. If they refuse to give, elicit and address concerns.

- Remember to call the Annual Giving staff if you need more information to address concerns.

- Regardless of the outcome, follow-up your call/visit with a personal note/e-mail. Mention any monies pledged or proposed in order to move the process along. Feel free to write your own note and forward a copy to the Annual Giving staff. If you would like assistance with drafting or sending your follow-up notes, contact the Annual Giving staff for help.

- Your follow-up conversation should be designed to gain your classmate’s interest and to explain the case for support.

- Remember the more you personally involve yourself in the solicitation, the more likely your classmate is to give and to give generously.

- If a significant delay is requested for making a decision you might ask “would you be willing to name an initial figure now?”
Frequently Asked Questions

“To which fund should I direct my Reunion Gift within Harvard Medical School?”
The Dean asks that all Alumni support current students by giving a gift each year to the Harvard Medical School Alumni Fund. When used in this matter, every $1,000 in current use giving has the impact of a $20,000 endowment gift. You may also direct your gift to a fund established by your class.

“What is the Harvard Medical School Alumni Fund?”
Created in 1951, the Alumni Fund is a specific fund to which alumni are encouraged to give each year, often known as the “Annual Fund” at other universities. Alumni may designate their gift to one of the following areas within the Alumni Fund: scholarships, education facilities, student research or keep it unrestricted to be used where needed most.

“Why should I support HMS when there are other organizations more in need of support?”
Many alumni are involved in worthy organizations. We are not competing with them for the same charitable dollars. Indeed, a gift to HMS is not a gift in the sense of helping an institution in jeopardy or dire circumstances. It is, rather, an investment in the School and the future of medicine, and an endorsement of our work and of your medical training.

“How is my Reunion Gift used?”
The full amount of every dollar given to the Harvard Medical School Alumni Fund directly supports current students. The average cost of attending HMS is $81,875. An average scholarship is $40,820. 81% of students received financial aid in the last year.

Upon graduation, the average student debt for members of the Class of 2013 was $104,107.

“Why is it important to support the Harvard Medical School Alumni Fund?”
Continued, focused, yearly support from the alumni to the Alumni Fund helps the School maintain its leadership position in the field of medical education by attracting the best, most talented students worldwide.

“I’ll do something, but I can’t give what you are asking for.”
Any gift, no matter the amount, makes a difference. Express your appreciation to classmates for their support and ask them what level they would feel comfortable with contributing. See page 18 for follow-up questions for alternatives to outright gifts.

“Do gifts of all sizes really matter?”
All gifts have an impact on the Alumni Fund. As a matter of fact, individual gifts of $750 or less accounted for 71% of the total alumni who made gifts to the Medical School in FY13.

“How much representation does Harvard Medical School provide to women and minorities?”
In 2013, 91% of entering students were underrepresented minorities in medicine, i.e., African American, Native American, Mexican American, and Puerto Rican. 8 foreign countries are represented within the student population of the entering class.

In 2013, 19% of entering students were underrepresented minorities in medicine, i.e., African American, Native American, Mexican American, and Puerto Rican. 8 foreign countries are represented within the student population of the entering class.
“How is financial aid need determined?"  
At HMS, financial aid is need-based only. HMS initially grants students a package of loans called the “unit loan," and then only students whose financial need exceeds the amount of the loan are eligible for scholarship aid from the School. Ex: For 2013-2014, the unit loan for incoming students is $28,300. Students whose computed need exceeds $28,300 will be offered HMS scholarship support. The cornerstone of the unit loan package is the Federal Direct Stafford Loan. Various low-interest, campus-based loans comprise the remainder of the package. Due to recent legislative changes, interest now accrues and payments are required from current students on federal loans. Applying the policies described above, the chart below shows examples of two types of financial awards.

“Why can't more of the endowment be used for financial aid?”  
Though the HMS endowment is substantial, only 7% is restricted for financial aid, covering just a quarter of the School's financial aid budget. It is Harvard's policy and standard operating procedure to avail only a small percentage of the income from the endowment for expenditure. This is part of the strength of HMS; your gift is a sound investment that will not be spent recklessly or frivolously. The remainder of the interest generated annually and not used for scholarship payout is reinvested, assuring the endowment both grows and will be maintained for perpetuity. In addition, most of the HMS endowment is restricted to other programs or initiatives.

<table>
<thead>
<tr>
<th>Two examples of student financial aid packages</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Example 1</strong></td>
<td><strong>Example 2</strong></td>
</tr>
<tr>
<td>Standard Budget</td>
<td>$78,975</td>
</tr>
<tr>
<td>Less Expected Family Contribution</td>
<td>-$50,675</td>
</tr>
<tr>
<td>Financial Need</td>
<td>$28,300</td>
</tr>
<tr>
<td>Federal Stafford Loan</td>
<td>$20,200</td>
</tr>
<tr>
<td>Federal Perkins Loan</td>
<td>$5,000</td>
</tr>
<tr>
<td>HMS Revolving Loan</td>
<td>$3,100</td>
</tr>
<tr>
<td>HMS Scholarship</td>
<td>NA</td>
</tr>
<tr>
<td>TOTAL AID AWARD</td>
<td>$28,300</td>
</tr>
</tbody>
</table>
Dear Name:

It has been awhile since we last saw each other. I hope you and your family have been well.

I am serving on our HMS Class of XXXX Reunion Committee and am writing with information about our YYth Reunion. Our Class will convene on campus Thursday, May 29 and Friday, May 30. Thursday night we will attend the Reunion Gala at the Four Seasons for cocktail hour, Class photos and a Class-specific dinner. We are also solidifying plans for other class specific events throughout the weekend. I certainly hope to see you there.

If you haven’t already completed your Reunion Report questionnaire, I want to remind you to do so online by visiting the Reunion website and clicking on our XXXX specific page. The deadline for submission is January 13.

Finally, it is tradition for the Reunion classes to present a special gift to the School in honor of our Reunion. The Committee hopes that members of our class will stretch their normal giving, or give for the first time, in order to present a gift that will make an impact on Harvard Medical School and its students. Our Class of XXXX is aiming to achieve 100% participation and $ZZZZ in total giving. I hope that you might join me and consider a special gift in honor of our YYth Reunion. You can click here and make your gift online.

I would be happy to answer any questions you might have or I can put you in touch with our Alumni Relations and Annual Giving staff liaisons at HMS.

I hope to see you at Reunion and I hope we can count on your support! I look forward to catching up in person in May!

Sincerely,

Name, HMS ’XX
HMS By the Numbers
Class of 2017
- 5,779 students applied for the 167 available positions for the Class of 2017
- First-year students come from 32 states and 8 foreign countries
- The Class of 2017 represents 72 undergraduate colleges and universities
- 23 first-year students have graduate degrees, 20 Master's, 3 Doctorates
- Members of the class range in age from 21 to 32 years old
- The Class of 2017 includes 76 (46%) men and 91 (54%) women
- 31 (19%) members of the Class are Underrepresented in Medicine as defined by AAMC and 46 (28%) are Asian
- 63 (38%) of the students are directly out of undergraduate institutions, 50 (30%) are one year out of undergrad, and 54 (32%) are greater than one year out from undergrad

Tuition
- Tuition for the 2013-2014 academic year for the first-year class is $52,100, bringing the average cost for an unmarried first-year student to $81,725 (including living expenses)

Financial Aid
- In Fiscal Year 2013, the HMS Office of Financial Aid awarded $15.5 million in need-based scholarship support (4% increase from Fiscal Year 2012), with an average scholarship of $40,820
- 81% of the student body (519 of 641 medical students) received financial assistance last year
- The average debt for the Class of 2013 was $104,107, ranging from $3,845 to $314,659 (Note: student debt includes the cumulative undergraduate, graduate and medical school debt). The medical school-only debt was $100,075.

Endowment
- Harvard Medical School's endowment on June 30, 2013 was $3.68 billion
- 42% of the Medical School's total endowment is restricted for use by our hospital affiliates
- 7% of the total endowment is restricted for financial aid, covering just a quarter of the School's financial aid budget
- 12% of the endowment is for unrestricted purposes—limiting Dean Flier's ability to direct resources to the most pressing needs of the school
- 14% of the endowment is restricted for Quad professorships, 20% is for HMS teaching, research and faculty support and 5% is designated for other priorities
Alumni Giving in Fiscal Year 2013

- 32% of alumni gave to HMS in Fiscal Year 2013
- Reunion classes came together and raised more than $3.7 million in support of the School
- More than $1.94 million was contributed by alumni, through the Alumni Fund and the Auditorium Chairs program, to support immediate-use student scholarships—this is the equivalent to the income stream of a $52 million endowment
- 433 alumni joined the Dean’s Council, the Medical School’s leadership annual giving society, by making gift of $2,000 or more ($100/year or more for each year since graduation for Recent Graduates)
- 1,453 alumni increased their gifts to the Alumni Fund
- 14 classes had a donor participation rate of 50% or higher