



# 2024

## Yale Reunion Gift Volunteer Guide

Pedestrian  
walkway  
and  
emergency  
vehicle use  
only

Pedestrian  
walkway  
only  
Please use  
sidewalks

“Being a part of my class reunion gift campaign gave me the opportunity to reconnect with friends. It was wonderful to see how our classmates rallied with their support for Yale, which was even more meaningful given the pandemic. I had the opportunity to support an incredibly innovative student engineering project at the intersection of technology and psychology with an immediate impact on the New Haven community during these challenging times. I’m looking forward to continuing to support such innovative and meaningful work at Yale.”

Evren Bilimer '00  
20th Reunion Gift Committee Co-Chair

“Yale was where I became the person I wanted to be and where I forged so many meaningful relationships. Giving back in honor of our reunion and encouraging others to do the same brings me great pride, as together we can provide that same experience to the next generation of Yalies.”

Ethan Karetsky '14  
5th and 10th Reunion Gift Co-Chair  
and Co-Chair of Agents

## Table of Contents

Welcome to the Reunion Gift Committee	3
Your Role on the Reunion Gift Committee	5
The Reunion Gift	6
<i>What is it?</i>	
<i>What counts?</i>	
<i>What does not count?</i>	
Ways to Direct Your Gift	7
The Solicitation Process	8
Making the Ask	11
Responding to Objections and Concerns	12
Ways to Make a Gift	16







## Welcome to the Reunion Gift Committee



Thank you for volunteering to serve on your class's reunion gift committee. We hope your volunteer service will enable you to rekindle old friendships and establish new ones throughout this reunion year.

Reunions are a time not only to reconnect, but also to give back. As a volunteer, you will play an invaluable role in helping your class set and achieve fundraising goals to support the many priorities of the university.

At Yale, we know that excellence is perishable, and that sustaining it requires not just stewardship, but also innovation and investment. With your time and support, we can maintain and build upon a tradition of excellence.

We are excited that you are celebrating your reunion during the *For Humanity* campaign. Every contribution from you and your classmates counts toward the campaign, expanding the scope of faculty and students to have an impact on the world.

We are grateful for your willingness to volunteer on behalf of Yale, and we truly appreciate your continued support of the university.

Chris Seager  
*Director, Reunion Giving*





## The Reunion Gift Committee

Peer solicitations are particularly valuable to the success of reunion giving. By enthusiastically encouraging your classmates to contribute to the class's reunion gift, you add personal warmth and individuality to the reunion giving process.

As a reunion gift committee member, you will ask a group of classmates to consider significant contributions to Yale above and beyond ongoing annual gifts to the Alumni Fund. You will partner with your classmates and Yale's development staff to match donors' interests with Yale's needs.

“As reunion gift chair over repeated cycles for 1985, I learned the skills to be an effective volunteer fundraiser for Yale. Volunteers are critical because most donors want to gain the perspective of peers, in addition to development officers, faculty and administrators, before making a gift. Volunteers inspire through the example they set and are often critical in initiating a philanthropic relationship between a donor and the university.”

Randolph Nelson '85, P '13, P '16, P '18  
10th through 35th Reunion Gift Committee Co-Chair  
and Co-Chair of Agents, For Humanity Campaign Co-Chair

# The Reunion Gift

## WHAT IS IT?

Reunions are a time to recognize nearly all new gifts and pledges committed during a five-year period, especially the months leading up to June 30th of the reunion year. The class total includes new gifts to the Alumni Fund and most capital, restricted contributions. To mark a reunion year, many alumni make a stretch commitment above and beyond their ongoing annual support. Unlike most unrestricted annual gifts, capital gifts of a certain size can be directed to endow programs, support athletic teams, or fund building projects on campus.

All reunion gifts count toward the *For Humanity* campaign.

## WHAT COUNTS?

Examples of reunion gifts may include:

- A larger-than-usual annual contribution to the Alumni Fund.
- A stretch multi-year pledge to the Alumni Fund.
- An annual gift to the Alumni Fund plus a capital commitment to a restricted designation.
- A capital gift, generally with a restricted purpose (athletic team support, endowed scholarships, professorships, etc.).
- A life-income planned gift, typically a charitable gift annuity or charitable remainder trust.
- A documented, non-contingent bequest intention.

## WHAT DOES NOT COUNT?

- Class dues, which are tax deductible but are gifts to the class and not to Yale.
- Payments on pledges made in a previous reunion cycle.
- Gifts to societies or to other organizations for which the university does not maintain budget control.



# Ways to Direct Your Gift

## UNRESTRICTED GIFTS: GIFTS TO THE ALUMNI FUND

Everyone in a reunion year is asked to make an annual gift to the Alumni Fund, regardless of any additional commitments they may make. Under the umbrella of the Alumni Fund, classmates may choose to direct their support to a variety of categories including: unrestricted, financial aid, the arts, the humanities, the sciences, athletics, library resources, student support, mental health and wellness, and New Haven support.

A larger-than-usual annual gift to the Alumni Fund or a stretch multi-year annual pledge, payable over as many as five years, is a great way to mark the reunion year!

Outright gifts to the Alumni Fund of \$10,000 or more per year provide an opportunity to name a Nathan Hale Associates Scholarship to benefit a student for one academic year. For gifts of \$20,000 or more, additional Nathan Hale Associates Scholarships can be named.

## RESTRICTED OR CAPITAL GIFTS: MATCH YOUR INTERESTS WITH YALE'S NEEDS

Yale is a diverse institution with something to offer all prospective donors. Opportunities such as programs at the graduate and professional schools or initiatives in medicine, public health, or the environment can be excellent matches.

These gifts all align with the initiatives of Yale's *For Humanity* campaign, which is intentionally structured to span five years to include every class in a reunion cycle. Every gift made for your reunion will also be counted toward the campaign. Scan the QR code below for more details:



*For Humanity*  
campaign



## The Solicitation Process

The solicitation process may be different for each of your classmates. Some may be prepared to make a gift and simply need to be asked, while others may need to be cultivated. Yale Office of Development staff can help you work through the specifics of each case.

### CONSIDER YOUR OWN COMMITMENT

Before you contact your classmates and ask them to give, your first step as a volunteer should be to consider your own gift. This should be a significant commitment, within your means, in honor of your reunion. The most successful volunteers are those who lead by example.

### LEARN ABOUT YOUR CLASSMATES AND YALE

To effectively make the case for giving to the reunion campaign, you should know as much about your classmates as possible.

Yale staff will send you information on your assigned classmates, including their giving summaries. This material will help you understand more about your classmates' philanthropic relationships with the university. Volunteers also find it helpful to read the class notes section of the *Yale Alumni Magazine* or search for updates on social media.

Once you are familiar with your classmates' past gifts to Yale and interests at the university, you can learn more about Yale's needs in these areas of interest. Review materials you are sent by the Office of Development and connect with your reunion giving officer for additional information.

You may also learn about various giving opportunities via the *For Humanity* website, [forhumanity.yale.edu](https://forhumanity.yale.edu), and the campaign gift guide, [forhumanity.yale.edu/giftguide](https://forhumanity.yale.edu/giftguide).

### CONTACT YALE DEVELOPMENT STAFF

Collaboration with Yale staff is crucial to the success of your solicitations. Before you contact a classmate about making a reunion gift, reach out to your assigned development staff to learn more about the classmate's relationship with Yale and discuss



a solicitation strategy. As the solicitation is underway, staff can follow up on your discussions, provide you with needed materials, develop recognition opportunities for restricted gifts, and assist with classmates' questions or concerns.

## **MAKE INITIAL CONTACT WITH CLASSMATES**

Send an email or letter to your classmates, explaining that you are on the reunion gift committee and that you are contacting classmates to encourage support for the university. Discuss your own commitment and why you decided to be involved in the effort. Suggest a follow-up conversation by phone, video call, or in person to catch up and speak further about the reunion gift effort.

## **CULTIVATE CLASSMATES**

Once you have reconnected with classmates, spend some time discussing Yale and the upcoming reunion. This may give you a sense of their interests and guide your solicitations. It may take a few conversations before classmates are ready to discuss their reunion gift.

## **ASK!**

After spending time on cultivation, ask each classmate to consider the commitment you previously discussed with Yale staff. If you have discovered new information during your conversations and feel that the suggested ask or purpose should be adjusted, contact your reunion giving officer to explore alternate opportunities before reaching out again to your classmate.

## **FOLLOW UP**

Some of your classmates may respond quickly and favorably to your initial contact. Others may require several follow-up gift discussions. Remember that a gift is not closed until Yale receives written confirmation. Once a classmate has verbally agreed to a gift, contact your reunion giving officer so that the gift can be documented.

## **SAY "THANK YOU!"**

A "thank you" will be important to your classmates. It can make them feel that their commitment is appreciated and encourage them to become more involved with Yale and your class in the future.



# Making the Ask

## POINTERS TO GUIDE YOU THROUGH THE ASK

- If possible, ask in person – or virtually via Zoom or FaceTime.
- Tailor the conversation of gift opportunities to your classmate’s interests.
- Thank classmate for previous gifts to Yale.
- Ask for a specific amount for a specific purpose.
- Remain positive and do not apologize for the ask.
- Allow your classmate to respond before speaking again.
- If your classmate says “yes,” thank them for their generous support and work with your reunion giving officer to document the gift.
- If your classmate says “maybe,” explore any hesitations. If a classmate needs time to consider a gift, offer to follow up in a few weeks. If a classmate is unsure about committing to the suggested amount, remind them that most commitments may be spread out over as many as five years.
- If your classmate emphatically says “no,” ask them to consider a smaller gift or different gift opportunity. Stress the importance of participation.

## COMMON MISTAKES TO AVOID

- Beginning a reunion solicitation before thinking about your own gift.
- Not asking for a specific amount or asking for too little.
- Speaking rather than allowing your classmate to respond to an ask.
- Settling for a classmate’s first offer, especially if it is lower than expected.
- Apologizing for the ask.
- Interpreting excuses or objections as “no.” It is important to explore any objections to see if they can be resolved.

*Remember that Yale development staff are always available to support you throughout your gift conversations.*



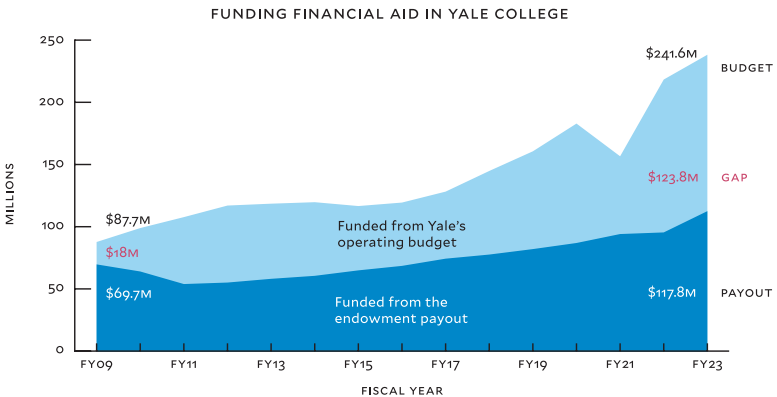
# Responding to Objections and Concerns

Even classmates who love Yale may have concerns about the university or their own finances, which may affect their willingness to make a significant commitment.

## THE ENDOWMENT:

“Yale’s endowment is so large; it doesn’t need my support.”

- This is the most common objection we hear. The university has developed a comprehensive website to help answer questions about Yale’s financial resources. We encourage you to visit [www.yale.edu/funding-yale](http://www.yale.edu/funding-yale).
- The endowment subsidizes the education of every student at Yale College, because tuition only covers about 50 percent of the full cost of a Yale College education, even for those who don’t receive financial aid.
- New gifts enable new ambitions. As Yale’s needs and ambitions evolve, additional resources are needed to meet them. Donors across many generations have supported Yale’s mission by providing gifts earmarked to support specific priorities. About 75 percent of the endowment is restricted in this way. The remainder supports core aspects of the budget that are not covered by the restricted funds. For instance, roughly half of the undergraduate financial aid budget is covered by restricted funds; the rest comes from unrestricted funds in the endowment.



## THE ALUMNI FUND:

“I already made my annual gift to Yale. Why are you bugging me?”

- Because reunions are a significant milestone in the life of alumni, a reunion gift is positioned as a commitment above and beyond one’s typical annual support for Yale. When you encounter this situation, you should thank your classmates for their gifts and suggest they use their current annual contributions as a platform from which to build.
- Classmates who typically make unrestricted gifts may wish to make a one-time stretch gift to the Alumni Fund. Or, they may prefer to make a multi-year pledge, the entire amount of which will count toward the class’s reunion gift total.

## LOCAL ORGANIZATIONS:

“I’d like to help Yale, but my local organization needs my money more. I serve on their board, volunteer in their clinic, send my children to their program, etc.”

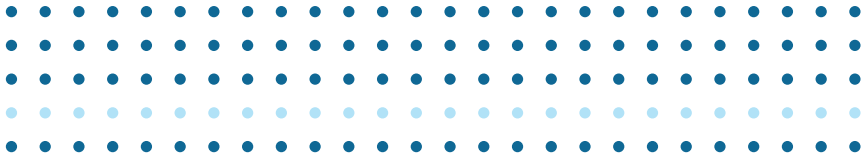
- Yale is proud that serving local communities and supporting great causes throughout the world are traditions of its alumni. The university encourages its alumni to continue to support these worthy causes.
- When classmates volunteer information about the causes they support, it is an opportunity to learn more about their interests. Talk to your reunion giving officer about gift opportunities at Yale that may align with your classmates’ broader philanthropic priorities.
- Do not suggest that support for Yale should replace support of other worthy causes. Acknowledge their other philanthropic commitments and encourage classmates to participate in the gift campaign at a level at which they feel comfortable.

## RETIREMENT:

“I’m retired now, so I’m re-evaluating whether I can increase my previous level of support.”

- It is possible to make a substantial gift to Yale that does not reduce the income a classmate receives from retirement investments. It is even possible to increase one’s income through a planned gift to the university.
- Three basic life income plans are available: charitable gift annuities, charitable remainder trusts, and pooled income funds. Each type of gift can provide income to classmates and/or loved ones for their lives. These gifts may offer charitable income tax deductions, reduce taxable estates, allow donors to avoid or defer capital gains on the transfer of appreciated assets, and increase income. When payments end, Yale will receive the principal of the gift.
- The Charitable IRA Rollover, which was made permanent in December 2015, allows individuals aged 70½ and older to make direct transfers of up to \$100,000 per year from individual retirement accounts to charities such as Yale without having to count the transfers as income for federal tax purposes. Since no tax is incurred on the withdrawal, gifts do not qualify for a charitable deduction but may be counted toward an individual’s minimum required distribution.
- Remember to ask your classmates, “Is Yale in your will?” Alumni who document their intentions to include Yale as a non-contingent beneficiary of their estate plans may receive reunion credit at a discounted value based upon the age of the youngest individual upon whose death Yale will receive the bequest. This age is typically a minimum of 65 years old as of June 30, 2027.
- Alumni and friends who have included Yale in their estate plans or have made another type of planned gift to Yale will be recognized through Yale Legacy Partners and invited to special events.





## **FINANCIAL OR PERSONAL SETBACKS:**

“I don’t have a lot of money,” “I am still in debt from student loans,” or “I am just getting back on my feet after a personal setback.”

- These are all valid reasons for reducing one’s level of charitable giving. Encourage classmates to participate at whatever level is appropriate for them. Participation matters! Corporations and foundations evaluate participation as a measure of alumni satisfaction when awarding grants and contracts to the university, and popular media publications use it when compiling collegiate rankings.
- In addition to making outright gifts, a classmate can make a pledge. Pledges may be paid over as many as five years, and the full amount of the pledge will count toward the class’s reunion gift total. Multi-year pledges allow classmates to maximize their giving in the reunion year.
- Many employers sponsor matching gift programs and will match charitable contributions made by their employees. Leveraging such a program is a great way to increase the impact of a gift.

# Ways to Make a Gift

## Check

Gifts may be made via checks payable to Yale University at:  
Yale University  
Office of Development  
PO Box 2038  
New Haven CT 06521-2038

## Phone

Use our toll-free line, 800.395.7646, to arrange a contribution via Visa, MasterCard, American Express, or Discover.

## Online

Make a gift or pledge online via credit card or PayPal at our website, [yale.edu/give](https://yale.edu/give).

## Securities

To transfer stock or mutual fund shares, have your bank or broker contact Yale's Office of Development, Contribution Processing, at 203.432.4107 or email [donated.securities@yale.edu](mailto:donated.securities@yale.edu).

## Donor Advised Funds

When making a gift through a DAF, use Yale's Federal Tax ID: 06-0646973

## Matching Gifts

Find out if your employer has a matching gift program. Visit [forhumanity.yale.edu/giftmatch](https://forhumanity.yale.edu/giftmatch).

## Gifts of Other Assets

Gifts of real estate, closely held stock, art, or collection-quality items may be possible.

## Planned Gifts

By including Yale in your will, trust, or as a beneficiary of your IRA, you may receive discounted reunion credit.

Gifts of this type, such as charitable gift annuities and charitable remainder trusts, may provide income for your lifetime and/or the lifetime of a spouse, in addition to significant tax benefits.

For more information on planned gifts and bequests, contact Yale's Office of Planned Giving at [development.plannedgiving@yale.edu](mailto:development.plannedgiving@yale.edu), 800.445.6086, or visit [yale.planyourlegacy.org](https://yale.planyourlegacy.org).





## Reunion 2024 dates:

May 23 – May 26, 2024:

Classes of 1954, 1959, 1964,  
1989, 1994, 1999, 2004, and  
2009

May 30 – June 2, 2024:

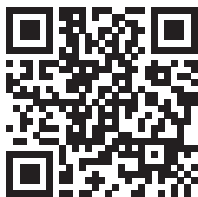
Classes of 1969, 1974, 1979,  
1984, 2014, and 2019

## For questions about Reunion Giving:

800.395.7646

[reunion.giving@yale.edu](mailto:reunion.giving@yale.edu)

[forhumanity.yale.edu](http://forhumanity.yale.edu)



## For questions about Yale College reunions:

203.432.2110

[reunions@yale.edu](mailto:reunions@yale.edu)

[alumni.yale.edu/reunions](http://alumni.yale.edu/reunions)



### *Photography*

*Cover: Dan Renzetti*

*Page 2: Jack Devlin*

*Page 3: Tony Fiorini*

*Page 4: Jack Devlin*

*Page 10: Jack Devlin*

*Page 17: Andrew Hurley*

*Back page: Schirin Rangnick*