We’re a team...
Dear Fellow Alumnus,

As a volunteer for Yale SOM’s Class Agent Program, you are a valued member of our fundraising team, and your time and effort are greatly appreciated. You have a specific and essential role by reaching out to classmates and increasing alumni participation. **We know you are up to the challenge!**

For the last several years, over 50% of our alumni community have supported the Yale SOM Alumni Fund. This high participation places SOM second among peer business schools, and first among Yale schools, including Yale College.

**Your dedication and leadership make achievements such as this possible.** I look forward to working with you in the months ahead and celebrating our successes as we continue to strengthen the Yale SOM Alumni Fund.

Kind Regards,

Rebecca Vitas Schamis ’00

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Rebecca Vitas Schamis ’00
Chair, Yale SOM Alumni Fund
Agent Directory

Becky Vitas Schamis (Chair) 2000
Sands Point, NY
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Jonathan Fitch 1978
Sherborn, MA
jwf@fitchlp.com

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Carol Lovell 1984
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Kavitha Bindra 2005
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Suzanne Decavele 2006
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Brian McCurdy 2010
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Casey Pickett 2011
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csrpickett@gmail.com

Dorothy Sandberg 2012
Greenwich, CT
dmhalsey@gmail.com
The Class Agent is responsible for spear-heading fundraising efforts of his or her class each year. As a Class Agent, your personal dedication, enthusiasm, and gift contribution play a vital role in encouraging annual support and in keeping your classmates connected with Yale SOM.
Here are just a few of the ways you can contribute:

**Lead** by example by making your gift prior to reaching out to classmates, then ask them to join you

**Prepare** by reading through the provided materials; keep up to date on Yale SOM news, and contact the staff with any questions

**Contact** your assigned classmates by email, phone or even face-to-face

**Emphasize participation** by explaining that their gift matters regardless of amount

**Follow up** with your classmates using the updates provided by Alumni Fund staff

**Thank** those that give

**Relay** feedback/updates to the Alumni Fund team

**Stay in touch** with Cindy Sacramone: cynthia.sacramone@yale.edu, (203) 432-1453

### Alumni Fund Outreach Timeline

**Yale School of Management's fiscal year runs from July 1–June 30**

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<th>Month</th>
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<td>Kick-off Letter from the Dean</td>
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<tr>
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<td>Honor Roll Solicitation</td>
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<tr>
<td>June</td>
<td>Fiscal Year-end Emails</td>
</tr>
</tbody>
</table>

Below outlines typical communications that are sent to our alumni during the academic year.
Gifts to the Alumni Fund directly support Yale SOM’s mission to educate leaders for business and society. The impact of collective giving by alumni worldwide is powerful. As Yale SOM redefines management education through its integrated, globally oriented curriculum, the Alumni Fund provides critical resources for the school’s core needs—including scholarships, faculty research, and curriculum innovation. Each gift is immediately put to use benefitting today’s students and faculty and helping the school achieve its goals.

**Impact of Giving at Yale SOM**

- **Provide** scholarships to attract and support top talent and loan forgiveness to support alumni working in the public or nonprofit sectors
- **Enhance** research and teaching on topics that cross functional boundaries including sustainability, healthcare, big data, and design
- **Implement** curricular innovations, such as Yale SOM’s unique raw cases, integrated core curriculum, and global courses focused on forming and managing teams
- **Send** students across the U.S. and the world for job treks, Global Network Weeks, and International Experience Trips
- **Support** Yale SOM centers and programs, including the Program on Social Enterprise and the Program on Entrepreneurship
How to Make a Gift to the Yale School of Management

By Mail

PLEASE MAKE CHECKS PAYABLE TO YALE UNIVERSITY.

Yale School of Management
Office of Development and Alumni Relations
P.O. Box 208200
New Haven, CT 06520-8200

By Phone

CONTACT: Cindy Sacramone,
Director, Yale SOM Annual Giving,
203 432-1453

Online

FOR ALUMNI FUND GIFTS:
Visit yale.edu/giveSOM
and select the designation you would like to support.

Matching Gifts

CONTACT: Adrienne Gallagher,
Director of Institutional Partnerships,
203 432-0207
Adrienne.Gallagher@yale.edu

If possible submit matching gift form along with your gift; or you can mail form at a later time, to address above, and note:

Attn: matching gifts;
or email form to:
matching.gifts@yale.edu

To check if your company matches, visit:
matchinggift.com/yale
Stock Gifts

CONTACT: Karen Kustra, 203 432-4107
TOLL FREE: 866 219-0885

For securities held by your bank or broker, we recommend an electronic transfer via the Depository Trust Company (DTC) system. Please give your bank or broker the following instructions:

The Northern Trust Company
Trust Department
DTC No. 2669
Account number: 26-12780
Account name: Yale University Donated Securities Account.

It is imperative that you email the details of the transfer to donated.securities@yale.edu alerting them to expect this gift. Please also copy cynthia.sacramone@yale.edu so we can track your gift from the Yale SOM Development Office. Failure to provide this additional information may cause a delay in our being able to recognize you as the donor.

Please include the following information in your email:

- Your name and address
- Broker name and phone number
- Name and/or ticker symbol of the security
- Number of shares
- School or department gift fund to be credited

Wire Funds

CONTACT: Emilio Caballero, 203 432-5867

BANK NAME: Bank of America
100 West 33rd Street
New York, NY 10001

ACCOUNT TITLE: Yale University Development

REFERENCE: Please provide identifying information—name, address, and phone number

ACH (EFT)
ABA Number: 011900571
Account Number: 9428411880

DOMESTIC WIRE TRANSFER
ABA Number: 026009593
Account Number: 9428411880

INTERNATIONAL WIRE TRANSFER
SWIFT Code: BOFAUS3N
Account Number: 9428411880

Yale’s tax identification number is 06-0646973
Gifts to the Yale SOM Alumni Fund can be directed to any of the following areas:

**Dean's Priorities**
Provides critical resources for the school's strategic priorities, and gives SOM the flexibility to develop innovative projects and meet emerging needs.

**Scholarships**
Helps SOM be competitive in attracting top students to the school and maintain a breadth of perspective both in and outside of the classroom.

**Loan Forgiveness**
Supports eligible alumni working in the public or non-profit sectors, as well as L3C organizations and B corporations. This hallmark program was the first of its kind at business schools, and remains the most generous and inclusive of any other business school program.

**Evans Hall**
Serves as a central hub for faculty and student collaboration across Yale and the Global Network for Advanced Management, and has significantly elevated the learning experience of our students since it opened in January 2014.

**Faculty Research**
Enhances research and teaching on topics that cross functional boundaries including sustainability, healthcare, big data, behavioral finance, social enterprise, and design.

**Curriculum & Case Studies**
Helps implement curricular innovations, such as Yale SOM's unique raw cases, integrated core curriculum, and global courses focused on forming and managing teams.

**MBA for Executives Program**
Enables curriculum development and programmatic innovations for this unique and rigorous program.

**Master of Advanced Management (MAM) Scholarships**
Provides crucial financial assistance as tuition can be prohibitive for potential students, especially those from emerging and developing countries.
Name a Yale SOM Alumni Fund Scholarship

With a gift of $10,000 or more to the Yale SOM Alumni Fund for scholarships, you can name a one-year merit-based scholarship, and support talented students like:

Elle Brunsdale ’15 B.A., ’19
I am so thankful for the generous scholarship support provided for my first year of study at the Yale School of Management. My experience so far has given me the skills to approach problem-solving from the perspective of an investor, economist, entrepreneur, CFO, CMO, and CEO. The integrated curriculum and conversations with my professors and classmates have opened my mind to a multitude of ways to serve others and sharpened my vision of the paths I might pursue in impact investing, entrepreneurship, nonprofit management, and public policy. I feel grateful to be learning from some of the brightest thinkers in the world whose lessons not only provide rich content, guiding principles, and highly applicable skills, but also instill a proactive sense of humility—a humble recognition of our limitations as humans along with knowledge about the processes and structures we can design to help mitigate these shortcomings in ourselves and others.

Lawrence Binitie ’18
I come from an inner city London background and making it to Yale SOM on a scholarship is a dream come true. I don’t know anyone from my background who has had a similar opportunity and am immensely grateful for getting this chance. As you may imagine, I am fully immersed in the coursework, but there is still time to contribute and partake in the amazing Yale SOM community. My extra-curricular activities have included organizing storytelling sessions, in which my classmates connect with each other in deeper and more meaningful ways, and being involved with the Internship Fund, helping to raise funds for SOMers to continue contributing to business and society. I am quite convinced Yale SOM is a special place. So much has changed in terms of our new Evans Hall building, but so much remains the same in terms of the culture of supporting each other to achieve success.
Reunion Giving

What is a Reunion Gift?
Yale School of Management is building a tradition of reunion giving, where alumni make a special commitment in honor of their reunion that is above and beyond their ongoing annual support. This “reunion gift” can be in support of the Alumni Fund or directed to a specific purpose at the School.

What is your role during a Reunion Gift Campaign?
During your reunion year, your class will form a special task force of volunteers—the Reunion Gift Committee—to contact the top donors of your class to ask for a larger-than-usual gift to support the School. Led by Reunion Gift Co-Chairs, the campaign will partner with your annual Alumni Fund outreach to ensure maximum giving and participation from your class. While the Reunion Gift Committee focuses on contacting a small selection of classmates, your role as Class Agent is to lead the effort to raise gifts and participation from the remainder of your class.

What else can you do?
As you approach your reunion year, please consider increasing your volunteerism and joining your class’s Reunion Gift Committee. Not only will you learn about all the other ways of supporting the School, you will also enjoy the camaraderie of working together with a group of dedicated and engaged classmates on your Reunion Gift Campaign. Your expertise as an Alumni Fund Agent will be a great asset to your class’s Reunion Gift Committee!

If you are interested in joining your class’s next Reunion Gift Committee, please contact:

Julia Hsieh
Deputy Director of Reunion Giving
julia.hsieh@yale.edu

The commitment is approximately a few hours a month at most and gift committee members are expected to:

- **Identify, cultivate, solicit, and thank** five to seven classmates who are capable of making a significant gift
- **Participate** in committee conference calls and briefing calls to receive updates and training
- **Collaborate** with SOM Reunion Giving and Development staff
- **Consider** their own stretch commitments
Recognition Programs
Consistent donors are the cornerstone of Yale SOM’s success, providing critical investments that have a significant impact on the excellence of the school, the leading research of our faculty, and the educational experience of our students.

To recognize and celebrate this important group of donors, Yale SOM launched SOM Loyal in 2016. New members will be invited to join when they have given to the Yale SOM Alumni Fund for three or more years, and we hope alumni will renew their support annually to remain a member.

More than 70% of all donors to the Yale SOM Alumni Fund in 2016–17 had given the year before. This incredible foundation of support helped the school achieve two key fundraising milestones last year: raising a record total of more than $3.5 million and having the highest number of donors ever to the Alumni Fund.

This outstanding participation reflects the strong and vibrant alumni community which is especially important as Yale SOM enters its fifth decade.
Become a Leader

Leadership donors provided more than 80% of the money raised for the Alumni Fund last year.

Leadership Giving Circles
Donors who give at leadership annual giving levels have a significant impact on the continued excellence of Yale SOM. In addition to providing crucial support, leadership gifts inspire greater giving from classmates and other donors.

Dean's Society
- **Business & Society Circle**: $100,000 and above
- **Dean’s Circle**: $50,000 – 99,999
- **Chair’s Circle**: $25,000 – 49,999
- **Innovator’s Circle**: $10,000 – 24,999
- **Partner’s Circle**: $5,000 – 9,999
- **Investor’s Circle**: $2,500 – 4,999
- **Fellow’s Circle**: $1,000 – 2,499
- **Associates’ Circle**: $500 – 999

*Graduates of the last 5 years
School Resources

We hope you find the following information helpful as you reach out to your classmates, for their participation in the Yale SOM Alumni Fund.
Cindy Sacramone
Director of Annual Giving
cynthia.sacramone@yale.edu
203 432-1453

Joel A. Getz
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203 432-5440

Roe Fellows
Assistant Dean, Development
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203 432-8484

Julia Hsieh
Deputy Director, Reunion Giving
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203 436-9498

Kiley Phelan
Assistant Director, Annual Giving
kiley.phelan@yale.edu
203 432-9391

Debbie Soulsby
Senior Administrative Assistant
debra.soulsby@yale.edu
203 432-3401
Helpful Internet Resources

Yale SOM Home Page
som.yale.edu

Yale Online Giving
yale.edu/giveSOM

Matching Gift
som.yale.edu/matchinggift

Yale SOM Alumni Fund
som.yale.edu/alumnifund

Reunion Gifts
som.yale.edu/reuniongiving

Alumni Home Page
alumni.som.yale.edu

Alumni Volunteer Opportunities
alumni.som.yale.edu/volunteer

Alumni Directory & Profile Updates
alumni.som.yale.edu/user/login

Alumni Chapters
alumnigroups.som.yale.edu

Faculty Research
insights.som.yale.edu

Yale School of Management
YaleSOMAlumni
yalesom_alumni
yalesom
Yale School of Management (SOM) Alumni and Student Community
Dear Class Agent,

Thank you for your dedication to Yale SOM. 
**Class Agents are key to a successful annual giving program, and are one of SOM’s most important volunteers.** You ensure the Yale SOM experience continues by keeping alumni connected, informed, and engaged. The personal contacts you make with your fellow classmates help to increase Yale SOM **Alumni Fund’s participation**, giving, and most importantly, support the next generation of leaders for business and society. We hope this toolkit serves as a useful resource for you when speaking and interacting with your Yale SOM peers. Please do not hesitate to contact us should you have any questions or need further assistance. On behalf of all of us at Yale SOM, thank you!

Joel A. Getz
Senior Associate Dean for Development & Alumni Relations

Joel A. Getz
Thank You
for serving as a Yale SOM Class Agent

Yale School of Management
Office of Development & Alumni Relations
2 Whitney Avenue
New Haven, CT 06510

Alumni Fund
som.alumnifund@yale.edu
yale.edu/giveSOM

Alumni Relations
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