



Welcome
2018 Alumni Leadership Summit
September 22, 2018



Welcome

Paul Curcillo, CST '84, TUAA President

Amy Larovere, KLN '83,

TUAA Vice President, External Affairs



TUAA Parliament

Reorganized in 2017:

- Smaller, more frequently meeting Executive Board – can act quickly
- Larger, more representative Parliament

Allows:

- 2-way communication/sharing
- Constituent groups bring their voice to TUAA table
- TUAA sends relevant information back to constituent groups



TUAA Parliament

TUAA Officers - 7

President, 2 Vice Presidents, Treasurer, Secretary, Counsel, Executive Director

TUAA Executive Board - 22

Officers, plus Committee Chairs and Past President

TUAA Parliament - 72

Executive Board plus heads of chapters and societies, school AAs, Owl Club

TUAA Ambassadors - 600

Leadership of all affiliated TUAA constituent groups

Temple University Alumni Association

332,000 Alumni



What is a Great Ambassador?

- **Adjectives?**
- **Behaviors?**
- **Actions?**

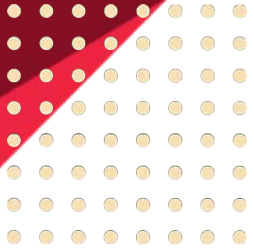
Please record your thoughts.





Agenda

8:30 AM	Registration and Breakfast
9:00 AM	Welcome
9:15 AM	The State of the University
9:35 AM	Why We Serve
10:15 AM	Break
10:30 AM	Critical Thinking & Problem Solving
11:45 AM	Lunch and TUAA Business Meeting
1:00 PM	Breakout Sessions
3:00 PM	Closing Remarks
3:30 PM	Networking Reception



The State of the University



Jim Cawley, CLA '91, LAW '94
Vice President, Institutional Advancement



Why We Serve

Moderator

Lisa Vaccarelli, Associate Vice President, Alumni Relations
and Annual Giving

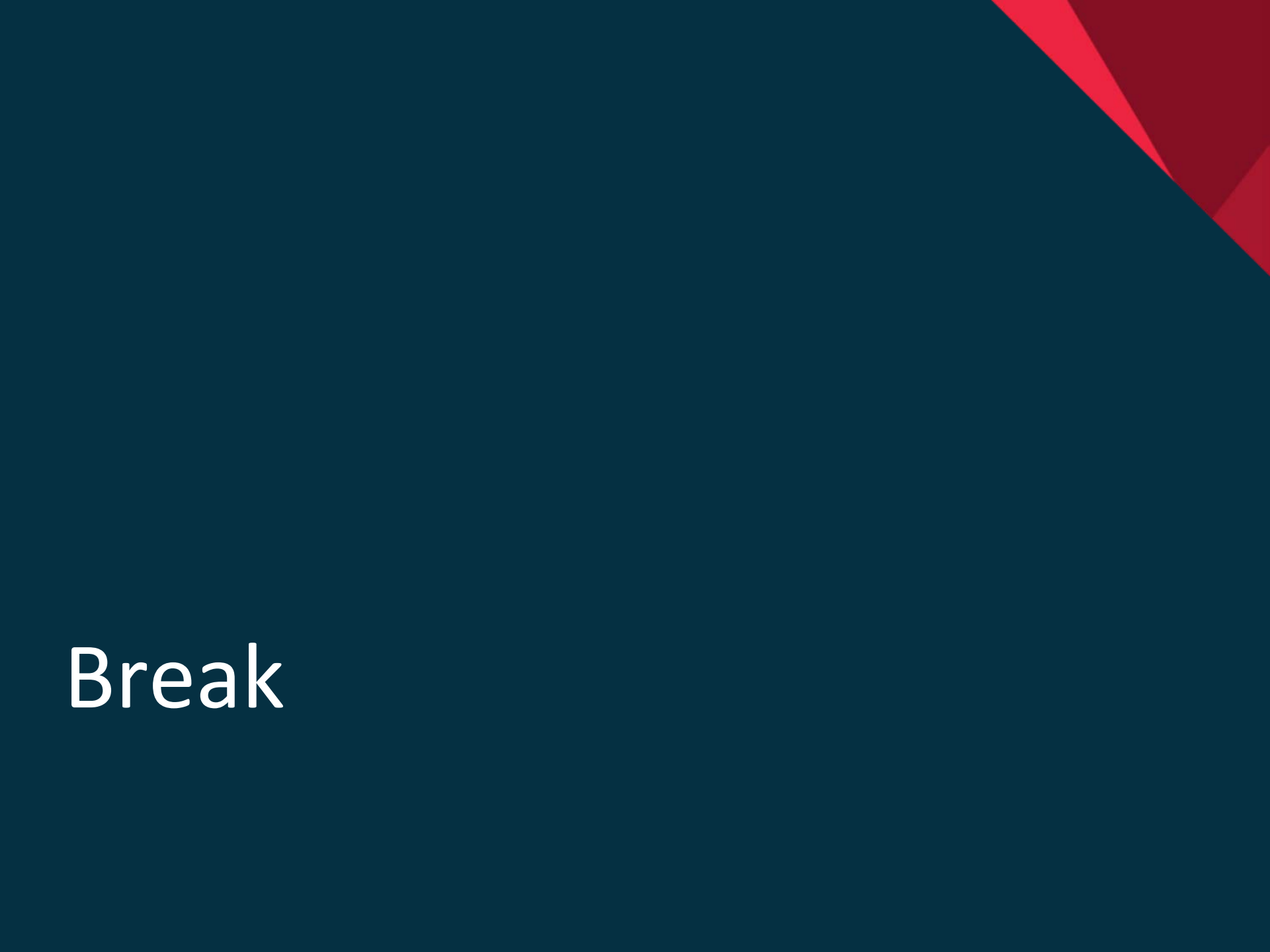
Panelists

John Ewell, CLA '87

Lynne Ewell, ENG '86

Merideth Ketterer, KLN '16, LAW '19

James Sanders, FOX '12



Break



*Creative
Thinking & Problem
Solving*
Dustin Kidd, PhD

What is critical thinking?

The National Association of Colleges and Employers (NACE) lists critical thinking and problem solving as the first of its 8 key competencies:

1. Critical Thinking/Problem Solving
2. Oral/Written Communication
3. Teamwork/Collaboration
4. Digital Technology
5. Leadership
6. Professionalism/Work Ethic
7. Career Management
8. Global/Intercultural Fluency



But how do they define critical thinking/problem solving? →

Critical Thinking/Problem Solving

Critical Thinking/Problem Solving: Exercise sound reasoning to analyze issues, make decisions, and overcome problems. The individual is able to obtain, interpret, and use knowledge, facts, and data in this process, and may demonstrate originality and inventiveness.



The Challenge - What Do They Want?

Alumni programs often focus on popular events and services where people often have the same experience, from attending a football game to reading the alumni magazine. But consumers increasingly want services that are tailored to their interests and needs.

As a result, volunteers like you can face the challenge of addressing the shift towards greater individuality while fulfilling your role as Temple ambassadors and volunteer leaders.



The Problem

You are all leaders who play an important role in cultivating meaningful Temple-oriented relationships with individuals and among groups of your fellow graduates.

Working in cooperation with on-campus partners and resources, **how can you as alumni volunteers help create more personalized Temple-oriented experiences for alumni that will compel people to stay connected? What are the barriers you face in doing this work and what would it take to solve those problems?**

Brainstorm Solution Ideas for Your Problem

Overcoming the problem...

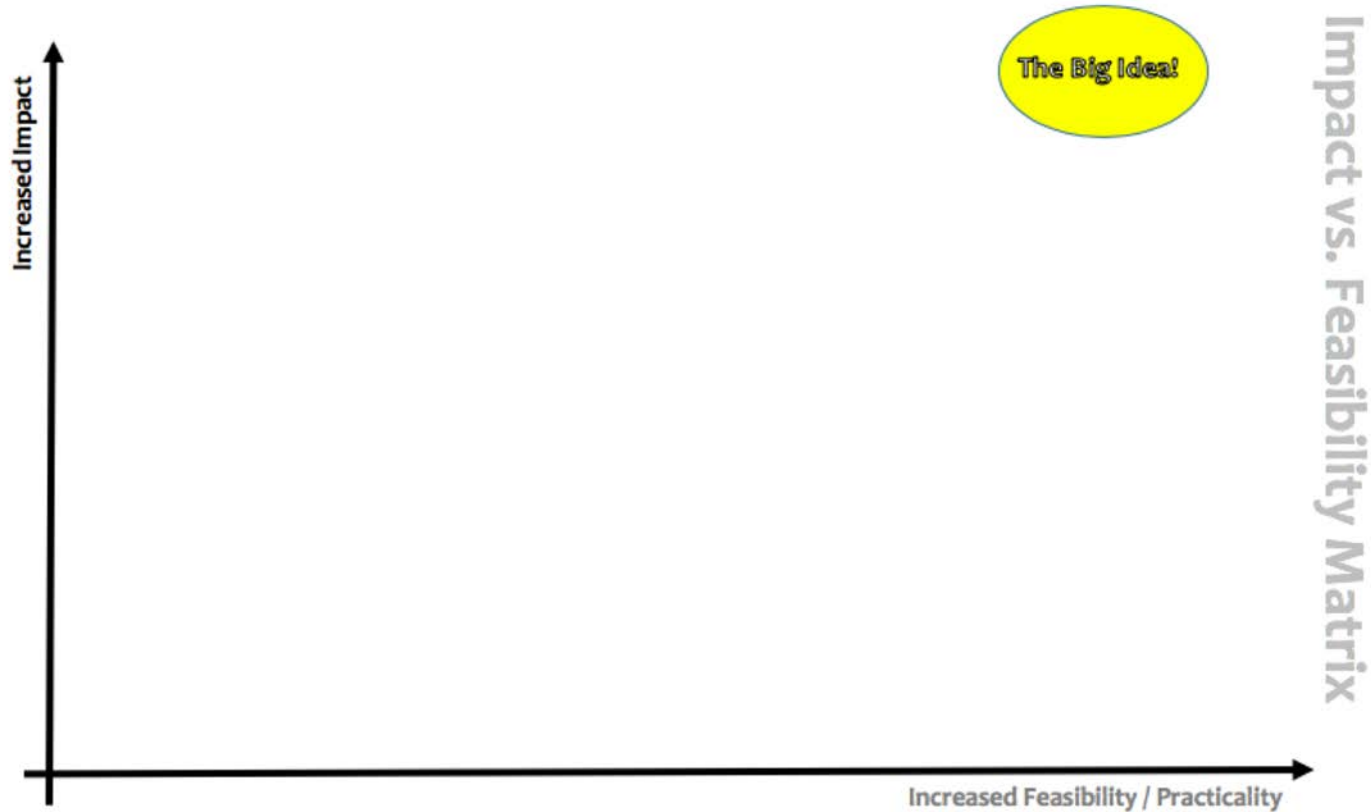
- Each person should write at least five creative ways to solve the problem on post-it notes. (No discussion.)
- Post notes on table or wall.
- Group similar ideas.
- Discuss ideas.
- Pick one idea to work with.

When brainstorming...

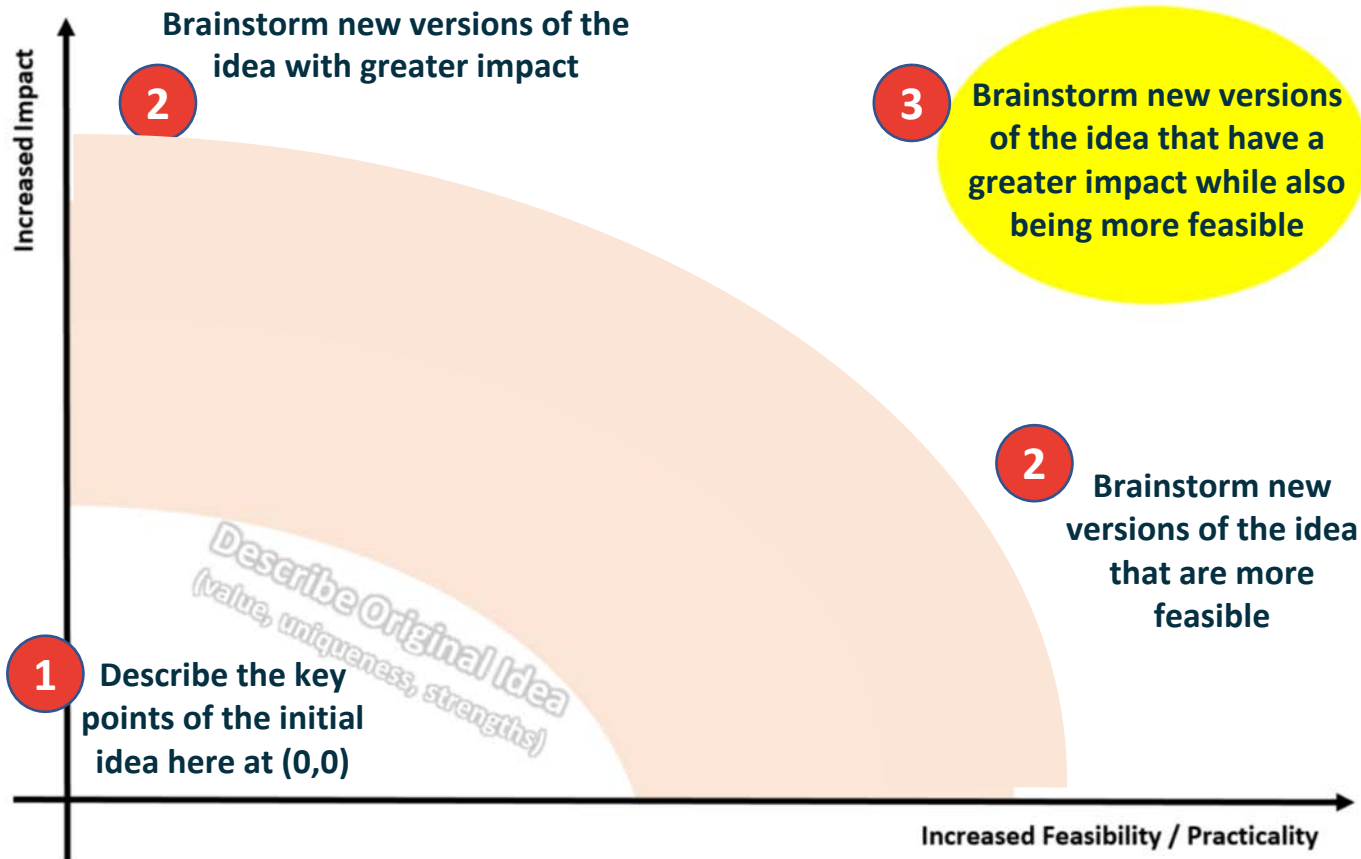
- Don't hold back! Let all your ideas flow
- No idea is too strange or radical!
- The point is to be creative with your solutions!



Impact vs. Feasibility Matrix



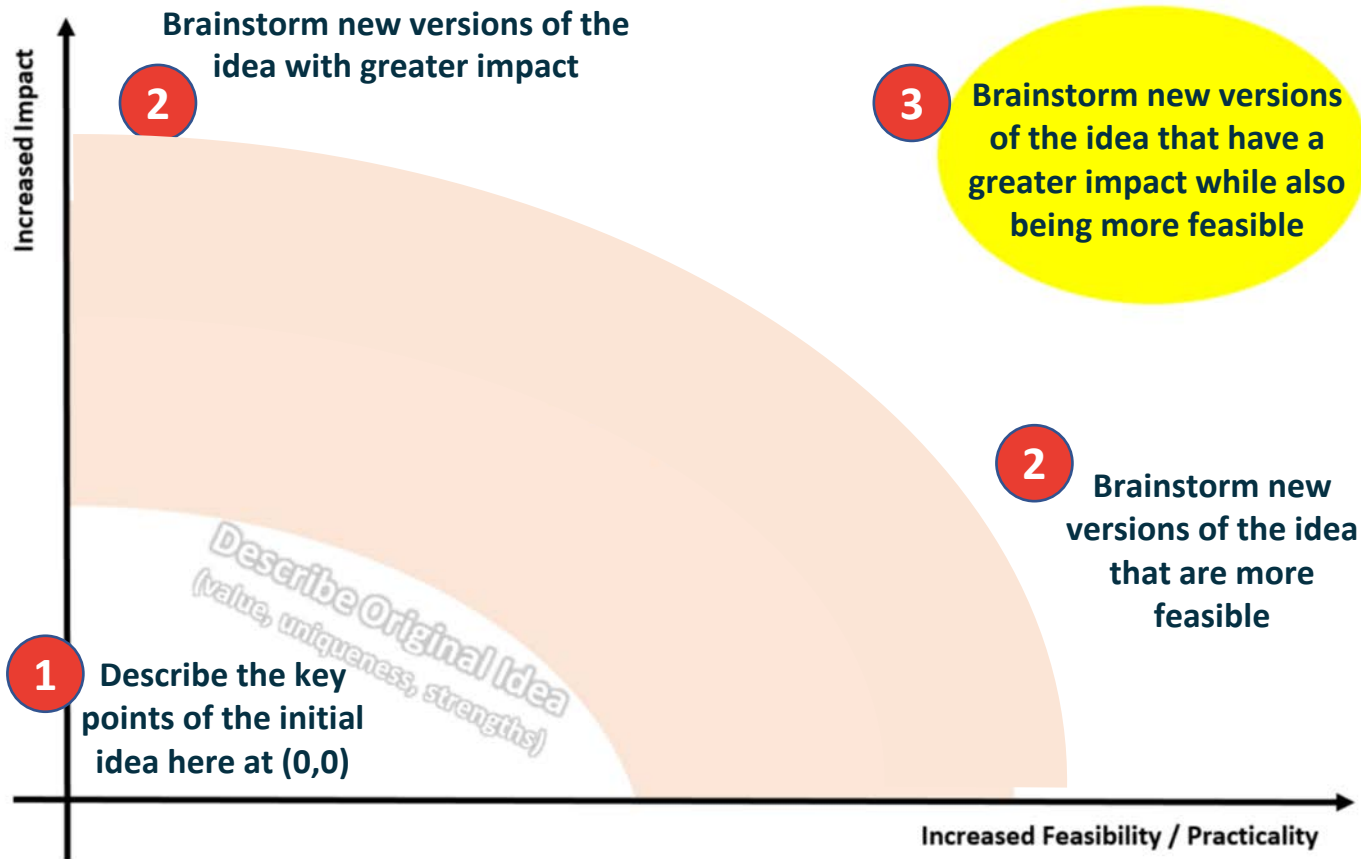
Impact vs. Feasibility Matrix



Step One

- Name the dimensions of the problem on post-its
- Don't worry yet about solutions
- What kinds of customized experiences do you and your members/constituents seem to wish for?
- What are the barriers?
- Work on this on post-its on your own for 1 minute and then share with your group...

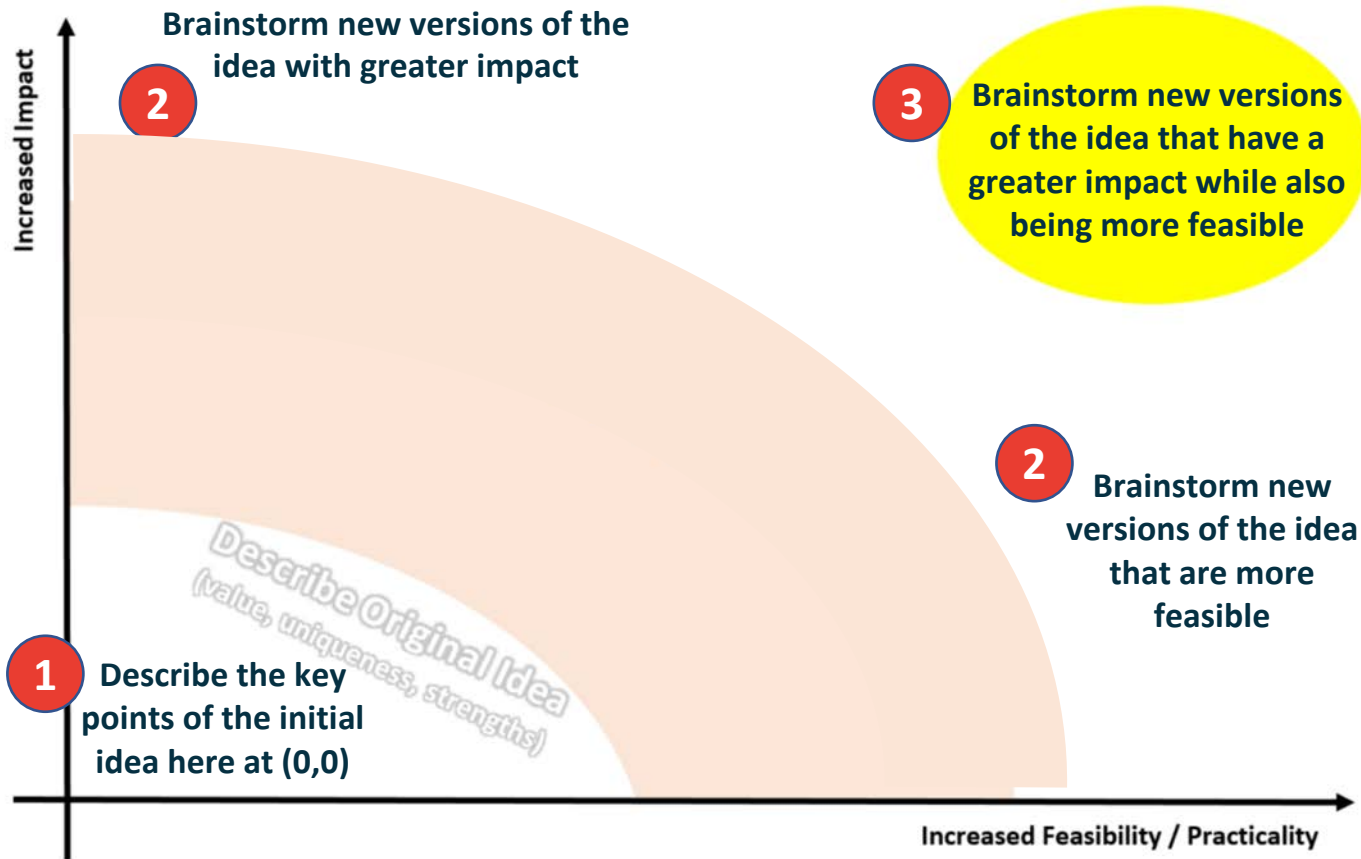
Impact vs. Feasibility Matrix



Step Two

- Identify some solutions that would have the biggest impact. It's fine if they seem completely impossible!
- AND
- Identify some solutions that are very feasible. It's fine if they have minimal impact!
- Work on this as a group!

Impact vs. Feasibility Matrix



Step Three

- Now, working from something already on your board, refine it to make it both impactful and feasible
- Take a moment with your group to decide what to focus on, and then get creative to make it work!
- Identify what resources you need to make this work.

Outcomes

- What solutions did you come up with?
- What was the process like?

Thank you!

Take-aways:

- You can have an impact!
- Develop innovative solutions
- Do it ... and figure out how to do it bigger and better



Lunch and TUAA Business Meeting



TUAA Parliament Business Meeting

September 22, 2018



Alumni Association



TUAA Business Meeting Agenda

- Welcome
- Approval of Minutes
- Treasurer's Report
- TUAA Executive Director's Report
- TUAA Fundraising Campaign
- Annual Giving Overview
- Adjournment

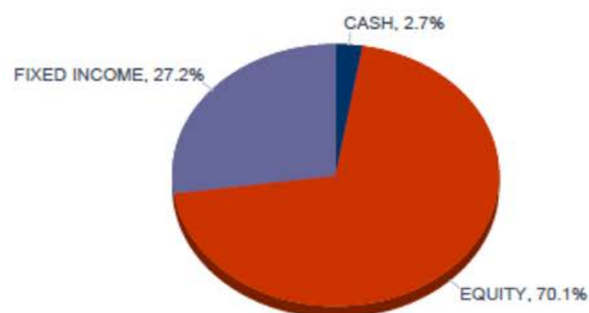
The background of the slide is a photograph of a street scene. In the foreground, several red Texas Tech University flags with the white 'TT' logo are hanging from a black lamppost. The lamppost is ornate and has a green street sign that reads '15th St'. In the background, there is a large, light-colored building with classical architectural features like columns and arched windows. Green trees with fresh leaves are visible on the right side of the frame. A large, semi-transparent lime green triangle is overlaid on the right side of the image, containing the text.

Treasurer's Report
Kristi DeSimone
KLN 01', FOX '17,

Portfolio Summary by Asset Class

Temple University Alumni Association Por

As of August 31, 2018



Details

Description	Market Value	Tax Cost	Annual Income	Yield
Cash	73,318	73,318	455	0.6%
Equity	1,927,641	1,555,922	31,552	1.6%
Fixed Income	747,362	773,314	21,983	2.9%
Total	2,748,320	2,402,553	53,990	2.0%

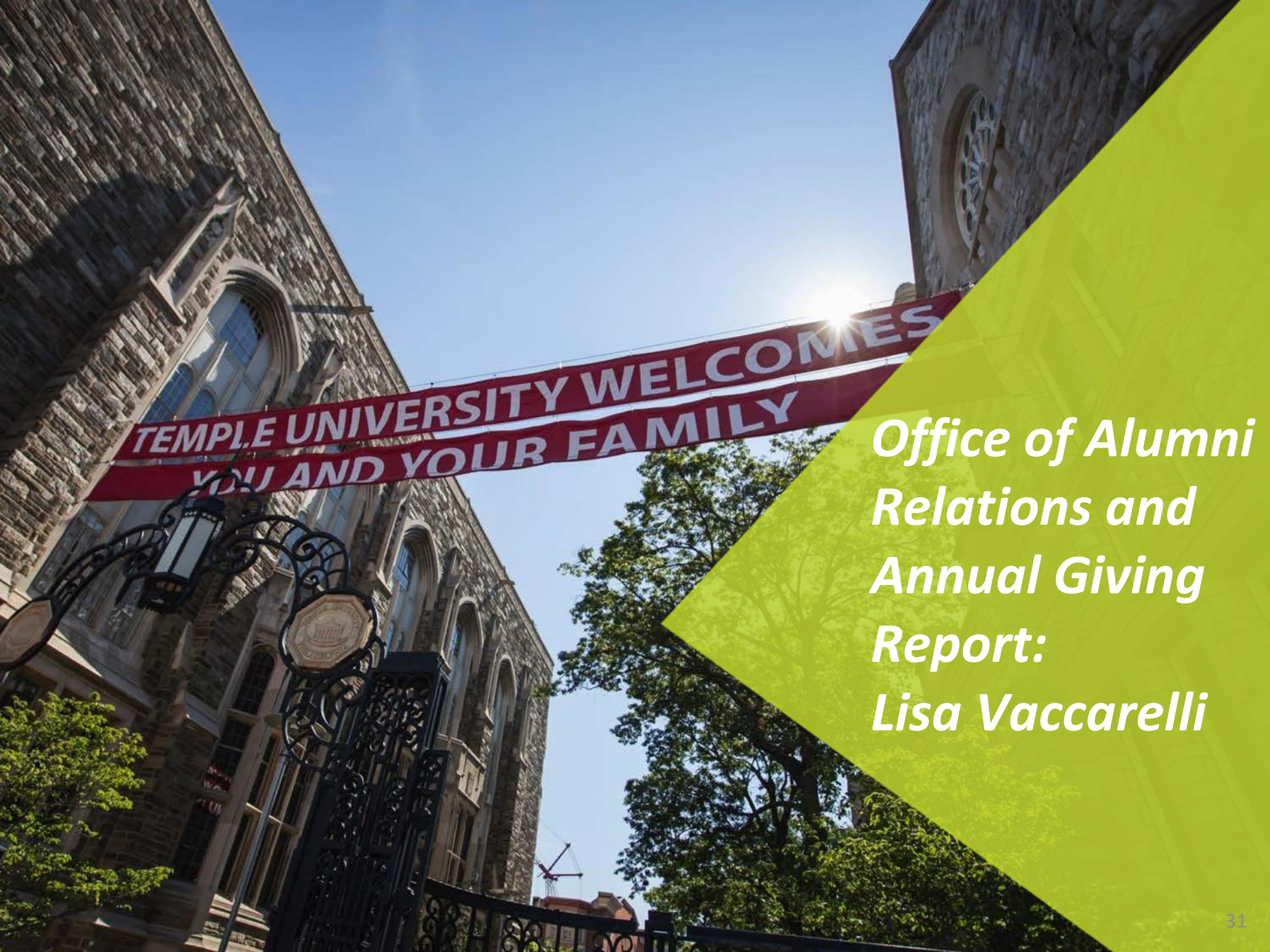
TUAA Budget - Income

TUAA Budget
Fiscal 2017 - 2018

	Fiscal 2018							Fiscal 2019
	Budget	Forecast					Vs Budget	Budget
INCOME	FY	Q1	Q2	Q3	Q4	FY (Act)	FY	FY
Auto/Homeowners Insurance Program	\$250,000	\$66,153	\$56,140	\$49,405	\$56,582	\$228,281	(\$21,719)	\$240,000
Life Service Fees	105,000	112,440	0	0	0	112,440	7,440	110,000
Life Insurance Program	35,000	0	0	0	39,163	39,163	4,163	35,000
Liberty Mutual Sponsorship	17,500	22,500	0	0	0	22,500	5,000	22,500
Short Term Medical Insurance Program	1,500	0	0	0	1,500	0	(1,500)	1,500
Energy Plus	2,000	432	358	310	0	1,101	(899)	1,500
Barnes & Noble Commission	1,500				1,940	1,940	440	2,000
Donations	1,000	0	0	250	801	1,051	51	1,000
Long Term Care	1,000	0	0	0	0	0	(1,000)	1,000
Checking Account Interest	300	207	218	202	192	819	519	900
Temple Abroad Commissions	0	410	400	0	487	1,296	1,296	0
Life Lock - Symantec	1,000	103	84	66	136	389	(611)	500
Alumni Association Returned Grants	0	0	0	0	0	0	0	0
Subtotal	\$414,300	\$202,246	\$57,199	\$50,233	\$100,801	\$408,979	(\$5,321)	\$415,900
Transfer of Earnings	102,400	0	0	0	102,400	102,400	0	120,300
Total Income	\$516,700	\$202,246	\$57,199	\$50,233	\$203,201	\$511,379	(\$5,321)	\$536,200

TUAA Budget - Expenses

EXPENSES								
University Events	\$215,000	\$877	\$33,237	\$4,710	\$138,916	\$177,740	(\$37,260)	\$215,000
Grants Program	35,000	0	13,000	21,630	370	35,000	0	35,000
Student/Young Alumni Engagement	35,000	1,130	3,086	10,657	22,198	37,071	2,071	35,000
Athletics Engagement	35,000	750	26,162	0	8,088	35,000	0	35,000
School/College Programming Initiatives	35,000	0	6,794	9,932	19,071	35,797	797	45,000
Chapters and Societies Development	35,000	0	4,484	22,320	8,197	35,000	0	35,000
Temple Professional Network/Career Services	25,000	7,052	6,924	3,750	12,276	30,002	5,002	25,000
Total Programs	\$415,000	\$9,809	\$93,687	\$72,999	\$209,115	\$385,610	(\$29,390)	\$425,000
Board & Committee Meeting Expenses	35,000	5,405	7,491	4,101	1,426	18,424	(16,576)	35,000
Accountants' Consultation Fees & UBIT	23,000	0	12,000	10,527	250	22,777	(223)	23,000
TUAA Advertising/Marketing	5,000	0	0	4,695	0	4,695	(305)	0
TUAA Representation at University Events	15,000	0	3,000	10,000	2,000	15,000	0	0
TUAA Marketing, Branding & Sponsorship	0	0	0	0	0	0	0	27,500
Investments Portfolio Management Fees	14,000	4,116	4,509	4,357	3,207	16,189	2,189	16,000
TUAA Athletics Tickets	8,000	7,492	0	0	0	7,492	(508)	8,000
Awards, Gifts, Condolences	1,500	84	69	500	300	953	(547)	1,500
Checking Account Fees/FedEx Fees	200	88	5	5	5	103	(97)	200
Subtotal	\$101,700	\$17,185	\$27,075	\$34,185	\$7,188	\$85,633	(\$16,067)	\$111,200
Total Expenses	\$516,700	\$26,995	\$120,761	\$107,184	\$216,303	\$471,243	(\$45,457)	\$536,200

A photograph of a Temple University building with a red banner hanging across it. The banner reads "TEMPLE UNIVERSITY WELCOMES YOU AND YOUR FAMILY". The building is made of stone and has arched windows. There are trees and a clear blue sky in the background. A large green diagonal shape is overlaid on the right side of the image.

TEMPLE UNIVERSITY WELCOMES
YOU AND YOUR FAMILY

*Office of Alumni
Relations and
Annual Giving
Report:
Lisa Vaccarelli*



What's New?

- We've grown!
- FY18 Successes
- FY19 Priorities



New Faces

Alumni Relations

- ***Tyra Ford***, *Director of Temple Professional Network*
- ***Amanda Giangiulio***, *Associate Director of Alumni Events & Operations*

Annual Giving

- ***Molly Clark Davis***, *Exec. Dir. of Strategy*
- ***Nicole Steiner***, *Exec Dir. of Operations*
- ***Christy Lee***, *Assoc. Dir. of Annual Giving*
- ***Blake Piper***, *Asst. Dir. of Programs & Initiatives*
- ***Sandy Strapp***, *Asst. Dir. of Student Philanthropy*
- ***Nicola Torchon***, *Asst. Dir. of Student & Young Alumni Philanthropy*



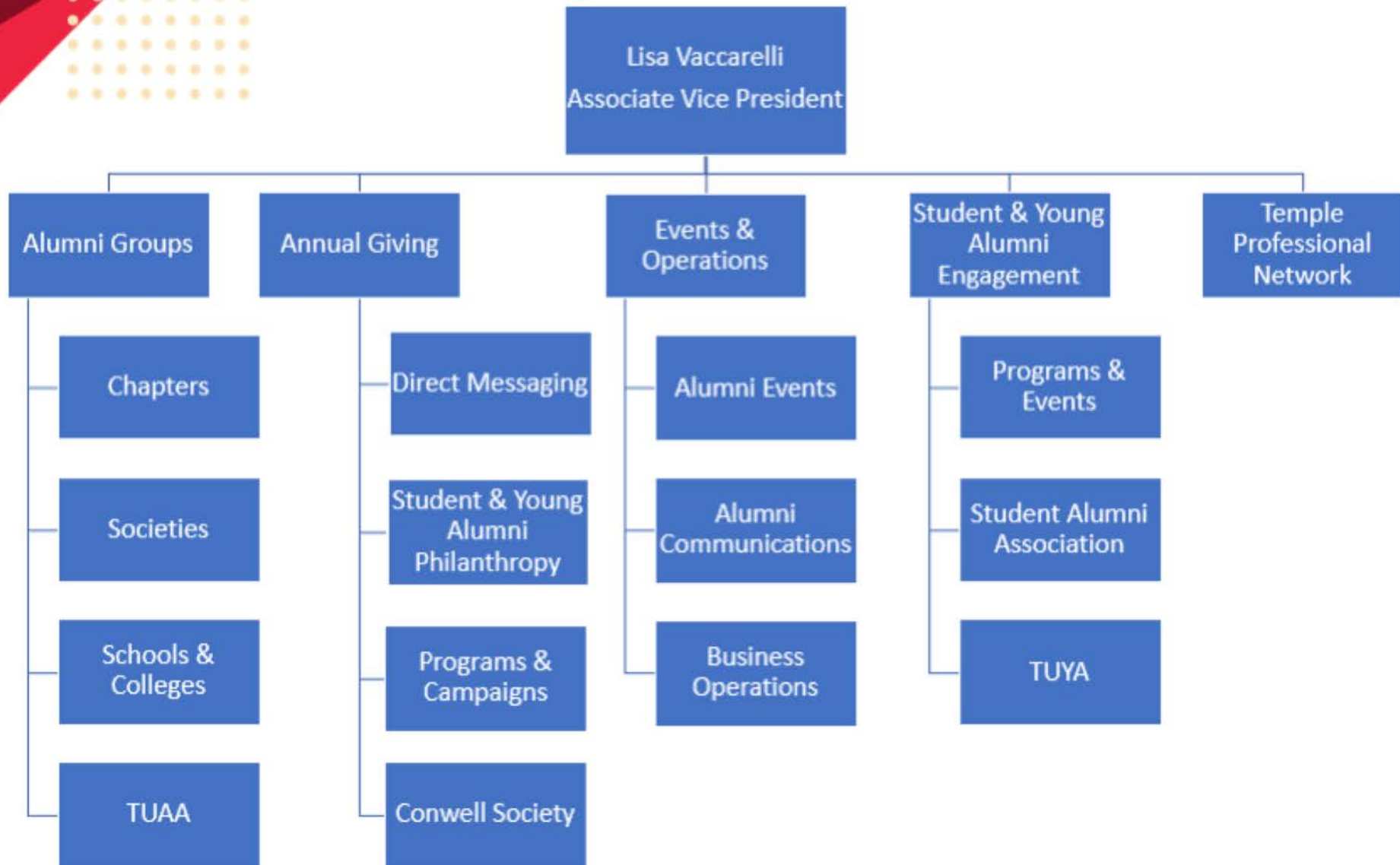
Institutional Advancement

MISSION

*Inspire a **culture of philanthropy** at Temple.*

***Every member of the Temple
community understands and embraces
their role in cultivating support for
Temple's future.***

AR + AG Organizational Chart





FY18 Outcomes

Description	FY17	FY18
Alumni Engagement Score**	8.44%	8.87%
Alumni Attendees	3775	3723
Young Alumni	1423	1683
Student	2038	3585
Alumni Donors	20, 649	20,152
TUAA Donors	49%	62%

**As of July 30, 2018*

***Percentage of solicitable alumni who attend events, volunteer, and/or make a gift through Temple.*



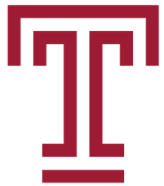
FY18 Successes



*Create meaningful opportunities for **students** to connect with **alumni**.*



FY18 Successes



Enhance *school and college-based alumni engagement* efforts.





FY19 Alumni Engagement Goals

CATEGORY	FY19 GOAL	FY19 YTD
<i>Unique Engaged Alumni</i>	27,000	7000
→ Alumni Donors	21,000	3047
→ Alumni Attendees	--	1830
→ Alumni Volunteers	--	600+

FY19 Programmatic Priorities



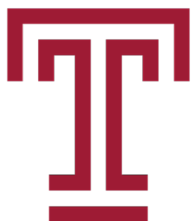
Cultivate a ***culture of philanthropy*** within the Temple community.



Consistently and accurately ***capture constituent engagement data*** across the university.



Create a ***comprehensive young alumni experience*** that spans regions, programs and units.



Tell a compelling story of ***AR, AG and TUAA as valued partners*** to internal and external stakeholders.



TUPortal for TUAA

Phase I: Now

- All TUAA leaders sign up for an accessnet account
- General communications to all alumni

Phase II: 3-6 months

- Customized portal soft launch to focus groups



Homecoming 2018

October 19-21

- ***Gallery of Success*** | Thursday, 4:30–6:30 p.m.
- ***Boyer Mosaic Concert*** | Friday, 7:30 p.m.
- ***Tyler Art Market*** | Friday, 12–8 p.m.
- ***Tailgate Village*** | Saturday, 3 hours prior to kickoff
- ***Temple vs. Cincinnati*** | Saturday, TBD



Other Events

September 30 | Temple Women's Network Annual Brunch

October 5 | Lew Klein Alumni in the Media and Excellence in the Media Awards

October 11 | DC Chapter - Dean Joseph Lucia

December 1 | NYC Chapter - Holiday Party

December 7 | Holiday Concert

*For more info and to register: **alumni.temple.edu***



GLADFELTER HALL
Social Sciences

ANDERSON HALL
Humanities →

COLLEGE OF LIBERAL ARTS

THIS IS OUR LIFE'S WORK

liberalarts.temple.edu



Temple Toast



TUAA
***Ambassador
Challenge:
Molly Clark Davis
& Nicole Steiner***



TUAA Ambassador Challenge

What is the Challenge?

This challenge is your opportunity to have a **tangible** and **lasting impact** on the *culture of philanthropy* at Temple University.



TUAA Ambassador Challenge

How do I support the Challenge?

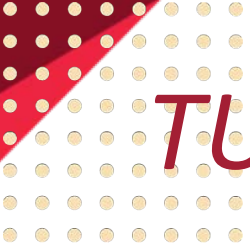
- Consider making a **stretch gift** to Temple University this year;
- Mark that stretch gift as **undesignated**;
- Unrestricted gifts are not earmarked for specific designations, but can be **used at the University's discretion**.



TUAA Ambassador Challenge

What will my gift support?

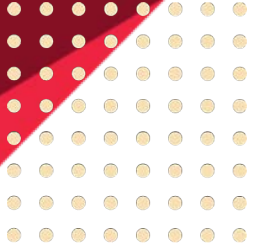
- The funds raised through the Challenge will be pooled to **incentivize** others to donate to Temple;
- Research shows that utilizing these type of funds - ***challenge funds*** - increases giving in terms of both donors and dollars.



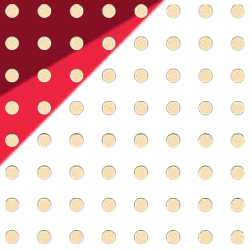
TUAA Ambassador Challenge

FY18 Challenge Impact

- The 3 units that won a share of the TUAA Temple Toast Challenge funds increased the number of donors they had by 600%, 400%, and 140% respectively;
- All gifts from young alumni (graduates of the last decade) were matched dollar for dollar. Young alumni donors increased by over 95%.



Adjournment



Afternoon Agenda

1:00-1:50 PM

Breakout Session 1 (choose one)

2:00-2:50 PM

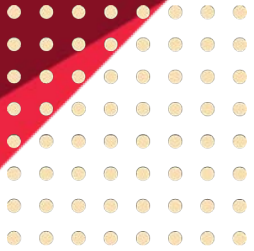
Breakout Session 2 (choose one)

3:00 PM

Closing Remarks

3:30 PM

Networking Reception



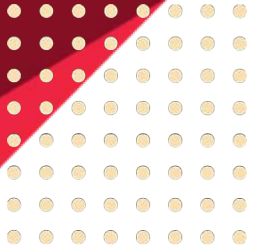
Breakout Sessions

Culture of Philanthropy: Soliciting Peers - *Room 746*

Putting the “T” in Temple Alumni Programing - *Room 606*

Temple Student Leadership Panel Discussion - *Room 745*

Building the Alumni Network – *Room 748*



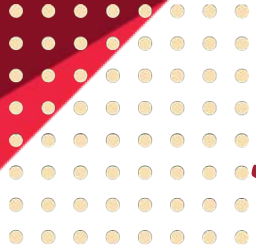
Closing Remarks

Paul Curcillo, CST '84, TUAA President

Amy Larovere, KLN '83,

TUAA Vice President, External Affairs

***Event materials posted at:
alumni.temple.edu/tuaanow***



Social – Alter Hall, 1st Floor

