

TUAA Leadership Summit

October 3, 2020

***@TempleAlumni
#tuaasummit2020***



Welcome

Mike Breeze, FOX '96
TUAA President



Agenda

- | | |
|---------------------|--|
| 12:35-12:40P | Welcome |
| 12:40-12:50P | Remarks, Thanks to Outgoing Officers |
| 12:50-1:00P | Institutional Advancement Update |
| 1:00-1:30P | University Update |
| 1:30-2:25P | <i>“Planning Differently to Engage Diverse Groups”</i> |
| 2:25-3:00P | TUAA Business |
| 3:00-3:10P | Questions and Answers / Closing |



Remarks

Paul Curcillo, CST '84



Thank You 2017-20 TUAA Officers

President: *Paul Curcillo, CST '84*

Vice President Operations: *Mike Breeze, FOX '96*

Vice President External Affairs: *Amy Larovere, KLN '83*

Treasurer: *Kristi DeSimone, KLN '01, FOX '17, '18*

Secretary: *Bo Birtwell, FOX '07*

Counsel: *Vanessa McGrath, LAW '11*

Counsel: *Harris Chernow, CLA '85, LAW '88*



Thank You, Paul Curcillo

*With Warm Thanks and Appreciation,
Your Friends on the TUA Parliament*

Jim Cawley, CLA '91, LAW '94

Vice President

Institutional Advancement



JoAnne A. Epps
Provost, Temple University

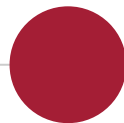


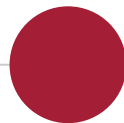
Planning Differently to Engage Diverse Groups

David W. Brown

Diversity Advisor to the Office of the Dean, Klein College of Media and Communication; Professor, Department of Advertising and Public Relations

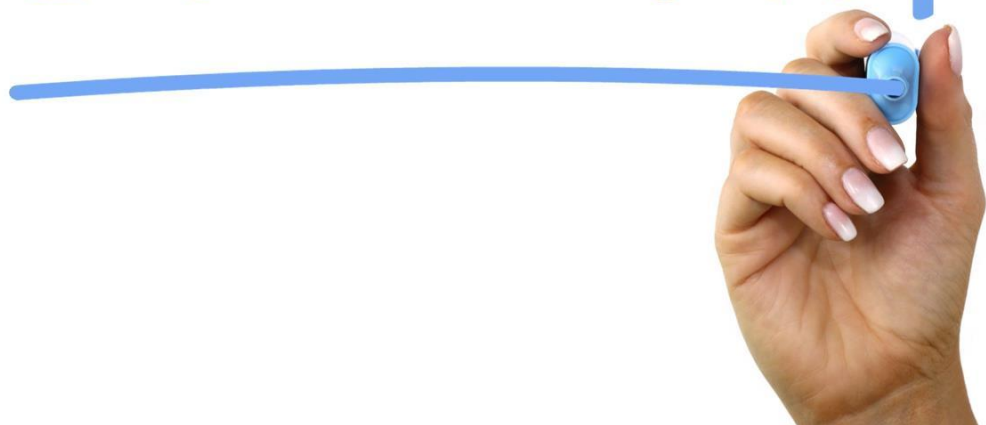




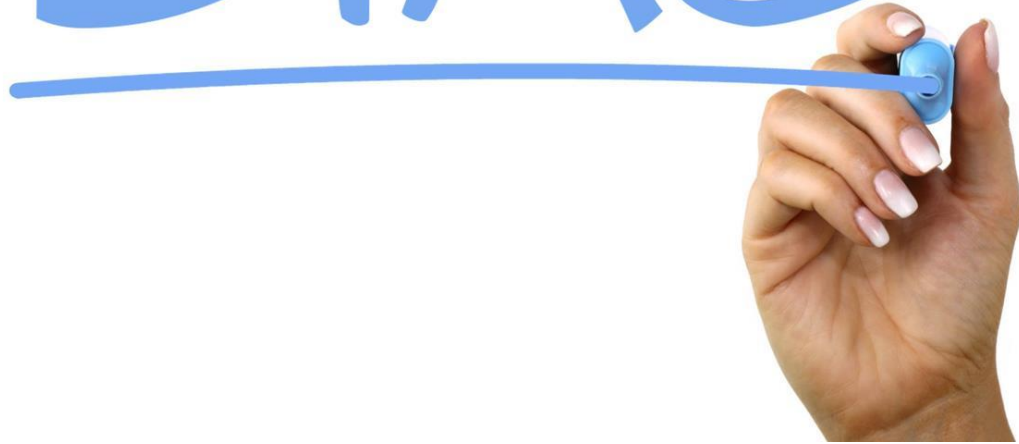




BELONG



BIAS



Affinity Bias

Where we favor certain situations and people because we're more familiar with them.



Where's Your Bias?

Make a list of six friends (no family members) who you would trust with something valuable to you.

For each of these individuals put a check mark next to each one if:

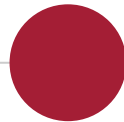
- You are the same gender as this person.
- You are from the same generation as this person.
- You are in close geography with this person.
- You are the same race as this person.
- You are of the same sexual orientation as this person.
- You have similar education attainment levels as this person.



Group Exercise:

Planning Differently to Engage Diverse Groups

What do you think are the biggest challenges for engaging more diverse alumni?





TUAA Business

- Introduction of New Officers
- Approval of Minutes
- Budget Review
- TUAA Culture



Welcome 2020-23 TUAA Officers

President: *Mike Breeze, FOX '96*

Vice President Operations: *Amy Larovere, KLN '83*

Vice President External Affairs: *Kristi DeSimone, KLN '01, FOX '17*

Treasurer: *Christopher Borden, FOX '08*

Secretary: *Bo Birtwell, FOX '07*

Counsel: *Angela Giampolo, LAW '08*

Counsel: *Reginald Streater, CLA '15, LAW '18*

● Mike Breeze, FOX '96



TUAA President

- Served as TUAA VP, Operations
- Co-Chair TUAA Strategic Planning Committee, 2015-17
- Fox Alumni Association President, 2011-13
- Fox Alumni Board, 2001 to 2015
- Principal, New Direction Capital, providing virtual CFO solutions to help small to mid-size companies achieve profitable growth

● Amy Larovere, KLN '83



TUAA Vice President, Operations

- ◉ Serves on the President's Leadership Council and chairs University Scholarship Committee
- ◉ Served as president of Owl Club and the Metropolitan New York Chapter of the TUAA
- ◉ Owns and runs planning, development and management company, New York City

● Kristi DeSimone, KLN '01, FOX '17

TUAA Vice President, External Affairs

- Founded and organized Comcast Temple Connectors
- Served as TUAA director-at-large, secretary, co-chair of the strategic planning committee and treasurer
- Director of Communications for Comcast Corporation, Philadelphia



● Chris Borden, FOX '08

TUAA Treasurer

- Chairperson, Budget & Investments Committee
- Adjunct professor & guest lecturer at FOX
- Owl Club Member
- First Vice President/Wealth Management
Financial Advisor Stedmark Partners, Janney
Montgomery Scott



● Bo Birtwell, FOX '07



TUAA Secretary

- Senior Vice President, Brown & Brown Insurance
- Chair, TUAA Temple Professional Network Committee
- Named a Young Gun by *Insurance Business Magazine*
- President, Young Alumni Association 2014-16

● Reginald Streater, CLA '15, LAW '18

TUAA co-Counsel

- Associate, Archer and Greiner's Business Litigation Group
- Focus: Commercial & Complex Litigation
- President, Temple Law Black Law Students' Association
- First Black President Temple Student Bar Assoc.
- Phi Alpha Delta Law Fraternity



● Angela Giampolo, LAW '08

TUAA co-Counsel

- Owner/Founder, Giampolo Law Group
- LGBTQ Estate Planning Attorney, Columnist, Investor, Radio Show Host
- As student studied in Beijing earning Certif. of Law in Chinese Law
- Traveled to Tanzania working at War Crimes Tribunal for Rwandan Genocide



Approval of Minutes





TUAA Operating Budget Review

- TUAA Annual Operating Budget: \$462,543
- Income earned from TUAA benefits programs and contributions to TUAA
- Prepared by Budget Investments Committee; approved by Executive Committee
- Supplements alumni engagement programming dollars by 1/3
- Parliament asked to review, question, comment

TUAA Operating Budget

TUAA FY21 Approved Budget			
9/30/2020 13:44:59			
	FY20-Budget		FY21- Budget
	Budget	YTD	Budget
	<i>Proposed</i>	<i>Actual</i>	<i>Approved</i>
INCOME			
Auto/Homeowners Insurance (Liberty Mutual)	\$190,000	\$180,017	\$174,000
Life Services Fee	110,000	110,000	110,000
Life Insurance Program (Meyers & Associates)	43,000	43,000	43,000
Liberty Mutual Sponsorship	22,500	22,500	22,500
Bank of America	1,100	400	1,100
Energy Plus	1,000	751	1,000
Barnes & Noble Commission	500	0	500
Donations	1,000	0	1,000
Checking Account Interest	1,000	597	1,000
Temple Abroad Commissions	600	600	600
Lifelock-Symantec	220	6	220
Subtotal	\$370,920	\$357,871	\$354,920
Transfer of Earnings	123,406	123,406	107,623
Total Income	\$494,326	\$481,277	\$462,543
EXPENSE			
University Events	\$170,400	\$102,977	\$129,000
Grants Program	35,000	17,000	35,000
Student/Young Alumni Engagement	35,000	28,502	35,000
Athletics Engagement	41,000	110,752	50,000
School/College Programming Initiatives	35,000	33,208	35,000
Chapters and Societies Development	35,000	50,093	35,000
Temple Professional Network	35,000	31,782	35,000
Total Programs	\$386,400	\$374,314	\$354,000
Board & Committee Meeting Expenses	35,000	35,000	35,000
Accountants' Consultation Fees & UBIT	29,000	29,000	29,000
TUAA Marketing, Branding & Sponsorship	24,360	10,118	24,500
Investments Portfolio Management Fees	18,000	18,000	18,000
Awards, Gifts, Condolences	1,500	1,500	1,500
Checking Account Fees/FedEx Fees	66	66	543
Subtotal	\$107,926	\$93,684	\$108,543
Total Expenses	\$494,326	\$467,998	\$462,543
Net Income	\$0	\$13,279	\$0



TUAA Culture

- ◉ Diversity, Equity & Inclusion
- ◉ Giving
- ◉ Connection
- ◉ Digital Engagement



TUAA Culture, The Journey Continues ...

What is Culture?

- Culture is the operating system of an organization. It's the way we get work done together
- Refers to the beliefs and behaviors that determine how its members relate & interact
- It is often implied and develops organically over time from its leaders & members
- What else is part of culture?



Diversity, Equity & Inclusion

2015 Strategic Priorities:

Reorganize the TUAA Board of Directors to be more reflective of the constituencies it serves and to be more adaptable to growth and change:

- Governance Task Force studies the TUAA's governance structure and operations
- Created a parliament consisting of 70 to 100 members allowing for broader representation and inclusion of alumni constituents within the TUAA
- Expand TUAA parliament to include affinity groups to be more representative of our Alumni base
- A nomination process that sought diversity and more representative of our Alumni base

2020:

Overtime, since 2015 these priorities have become a part of our culture. The work is never finished, we will continue to listen, learn, and be open to ways to become more Diverse, Equitable & Inclusive.

Giving

Our giving makes a difference:

- Time
- Talent
- Treasure

Sharing our “Make a Difference” stories with Alumni





Connection

- Attracting new alumni and building a sustaining lifelong relationship with TU
- How do we keep connection going with Alumni?
- How do we continue building our culture so it's part of everything we do?
- How do we recruit new Alumni volunteers that foster the TUAA connection?



Digital Engagement

- Lessons learned from sheltering in place
- Happy Hours have had a positive impact:
 - TUAA Tokyo Regional Chapter, Mayumi Alice Kitaoka, FOX '14
 - TUAA Los Angeles Regional Chapter, Dana Alyss '12
- We have a window of opportunity that may close post-Covid 19
- We need this to be a part of our culture to keep an on-going engaged relationship with Alumni outside of the Greater Philadelphia region.



TUAA Committees

Alumni Center, **Harris Chernow**

Alumni Events, **Kristi DeSimone**

Athletics, **Patrick Marion**

Awards and Grants, **Kristi DeSimone**

Budget, Finance and Investments, **Christopher Borden**

Bylaws, **Angela Giampolo & Reginald Streater**

Colleges and Schools, **Larry Rubin**

Communications, Marketing & Branding, **Darin Bartholomew**

Development, **Lynne Ewell**

Nominations, **Mike Breeze**

Parliament Credentialing, **Mike Breeze**

Regional Chapters and Societies, **Beth Davis**

Student & Young Alumni Engagement, **Taylor Spoon**

Temple Networking and Lifelong Learning, **Bo Birtwell**

Business Meeting Adjournment



Homecoming and Family Weekend at Home



Homecoming Week : October 12- 18

- Homecoming.temple.edu site is live!
- [Virtual events and programs](#) to engage alumni, families and students where they are

Virtual Spin on Traditions

- Tyler Art Market | online shopping experience throughout October
- Boyer Mosaic Concert | streaming on October 16
- Cherry & White Tailgate from your Nest & Homecoming game| Streaming on October 17
- Family Weekend| October 16-18

Engagement Beyond Philadelphia

- TUYA virtual 5K
- Charles Library celebrations and conversations
- Rome Virtual Reunion
- Themed Homecoming Merchandise



Closing and Thank You

