

TUAA Parliament Meeting

Saturday, May 16, 2020



TUAA President's Welcome

Paul Curcillo
President, TUAA



Agenda

- 3:00–3:10 PM Welcome – Paul Curcillo, TUAA President
- 3:10–3:25 PM University Update – Jim Cawley, Vice President,
Institutional
Advancement
- 3:25–3:30 PM ACE Update – Eliza Stasi, Interim Associate Vice
President, ACE
- 3:30–3:45 PM TUAA Business – Mike Breeze, TUAA Vice President
Operations
- 3:45–4:50 PM Professional Development –
Erica Wexler: Juggling Priorities in a Virtual
Environment

In Memoriam

Jack Carton, FOX '75



- Founding Member/Past Chair, Metropolitan New York Alumni Chapter
- Member TUAA's Temple Professional Network Committee
- Co-founder and C.O.O./C.F.O. of Prolific Media Holdings



TUAA Reflections

Paul Curcillo
President, TUAA



TUAA ACCOMPLISHMENTS- Working Together

Updating TUAA Governance to build a solid foundation for our shared journey

Strategizing engagement opportunities to reach individuals and constituencies “where they are”



TUAA ACCOMPLISHMENTS- Working Together

**Achieving recognition as key University partner
with athletics, the arts, schools and colleges,
and the Temple University Health System**

**Leading alumni to support Temple as
participants, volunteers, donors, and leaders**

● University Greetings

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





ACE Update

- ⦿ Alumni Engagement
- ⦿ Annual Giving
- ⦿ Marketing Strategy & Operations
- ⦿ Strategic Engagement



TUAA Business Meeting

- ⦿ Approval of Minutes - Mike Breeze
- ⦿ Budget Update – Kristi DeSimone
- ⦿ Development Report – Lynne Ewell
- ⦿ Nominating Committee Update – Paul Curcillo
- ⦿ Temple Professional Network - Bo Birtwell



TUAA Operating Budget Review

- FY20 Operating Budget Update
- PNC Portfolio Update
- FY21 Projections
- Vote prior to June 30

TUAA Operating Budget

	FY19-Budget		FY20 - Budget						
	Budget	YTD	Budget	Actual					Vs Budget
	Proposed	Actual	Proposed	Q1	Q2	Q3	Q4	FY (Est)	FY
Auto/ Homeowners Insurance (Liberty Mutual)	\$240,000	\$174,604	\$190,000	\$5,200	47,402	41,415	\$36,000	\$180,017	\$9,983
Life Services Fee	110,000	112,190	110,000	0	0	110,000	0	\$110,000	\$0
Life Insurance Program (Meyers & Associates)	37,500	43,630	43,000	0	0	0	43,000	\$43,000	\$0
Liberty Mutual Sponsorship	22,500	22,500	22,500	0	22,500	0	0	\$22,500	\$0
Bank of America	1,000	1,100	1,100	0	0	400	0	\$400	\$700
Energy Plus	1,500	612	1,000	200	0	551	0	\$751	\$249
Barnes & Noble Commission	2,000	0	500	0	0	0	0	\$0	\$500
Donations	1,000	0	1,000	0	0	0	0	\$0	\$1,000
Checking Account Interest	900	1,272	1,000	224	174	199	0	\$597	\$403
Temple Abroad Commissions	0	687	600	450	0	150	0	\$600	\$0
Lifelock- Symantec	500	206	220	3	3	0	0	\$6	\$214
Subtotal	\$416,900	\$356,801	\$370,920	\$56,077	\$70,079	\$152,716	\$79,000	\$357,871	(\$13,049)
Transfer of Earnings	120,300	120,300	123,406	0	0	0	0	123,406	0
Total Income	\$537,200	\$477,101	\$494,326	\$56,077	\$70,079	\$152,716	\$79,000	\$481,277	(\$13,049)
University Events	\$215,000	\$216,655	\$170,400	\$4,571	\$98,406	\$0	\$0	\$102,977	(\$67,423)
Grants Program	35,000	25,500	35,000	0	0	17,000	0	\$17,000	(18,000)
Student/Young Alumni Engagement	35,000	36,158	35,000	0	15,809	12,693	0	\$28,502	(6,498)
Athletics Engagement	35,000	37,900	41,000	13,160	96,800	792	0	\$110,752	69,752
School/College Programming Initiatives	45,000	44,094	35,000	0	24,007	9,201	0	\$33,208	(1,792)
Chapters and Societies Development	35,000	35,597	35,000	5,230	38,574	6,289	0	\$50,093	15,093
Temple Professional Network	25,000	25,000	35,000	0	31,694	88	0	\$31,782	(3,218)
Total Programs	\$425,000	\$420,904	\$386,400	\$115,000	\$305,290	\$46,063	\$0	\$374,314	(\$12,086)
Board & Committee Meeting Expenses	35,000	34,993	35,000	5,000	25,000	2,000	3,000	35,000	0
Accountants' Consultation Fees & UBIT	24,000	28,904	29,000	4,000	0	25,000	0	29,000	0
TUAA Marketing, Branding & Sponsorship	27,500	22,500	24,360	768	3,680	4,920	750	10,118	(14,242)
Investments Portfolio Management Fees	16,000	18,638	18,000	0	0	0	18,000	18,000	0
TUAA Athletics Tickets	8,000	7,720	0	0	0	0	0	0	0
Awards, Gifts, Condolences	1,500	1,825	1,500	250	500	500	250	1,500	0
Checking Account Fees/FedEx Fees	200	63	66	66	0	0	0	66	0
Subtotal	\$112,200	\$114,643	\$107,926	\$10,084	\$29,180	\$32,420	\$22,000	\$93,684	(\$14,242)
Total Expenses	\$537,200	\$535,547	\$494,326	\$125,084	\$334,470	\$78,483	\$22,000	\$467,998	(\$26,328)
Net Income	\$0	(\$58,446)	\$0	(\$69,007)	(\$264,391)	\$74,233	\$57,000	\$13,279	\$13,279



TUAA PNC Portfolio

Client Overview Summary

TEMPLE UNIVERSITY ALUMNI ASSCONS

As of May 13, 2020

Client Overview

Market Value:\$2,625,210

Tax Cost:\$2,892,687

Estimated Income:\$62,160

Principal Cash:\$27,135

Income Cash:\$0

ST Capital Gain:\$10,748

LT Capital Gain:\$100,773

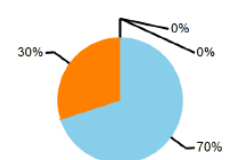
ST Capital Gain Prev Year:\$5,383

LT Capital Gain Prev Year:\$236,370

Holdings Overview

	Market Value	Current Allocation	Yield	Est.Ann.Income
Equity	\$1,655,154	63%	2.21	\$36,601
Fixed Income	\$860,504	33%	2.95	\$25,374
Cash	\$109,551	4%	0.17	\$185
Alternatives	\$0	0%	0.00	\$0
Total	\$2,625,210	100%	2.37	\$62,160

Holdings Summary



Equity
Fixed Income
Cash
Alternatives

Account Summary

*Performance as of April 30, 2020

Account Name	Account Number	Account Type	Market Value	Est.Ann.Income	Yield	1 Yr Perf*	3 Yr Perf*
TEMPLE UNIVERSITY ALUMNI ASSCONS	2135501XXX8558	CONSOLIDATION ACCOUNT	\$2,625,210	\$62,160	2.37%	-2.45%	4.29%



Temple Toast 2020 - April 23



- Donors: 1,850
 - Dollars: \$518,000 (31% increase over 2019)
-

TUAA Ambassador Challenge funds raised:
\$14,000

TUAA Ambassador Challenge funds used:
\$14,000

Avg gift FY19 vs FY20 (not including gifts of \$10k+):
\$92.21/\$185.76



TUAA Giving FY20

- **Parliament**

62% participation

- **School and College Alumni Association Boards**

52% participation

- **Affiliated TUAA**

46% participation

Temple Professional Network

PROFESSION**OWL**

Young Alumni Mentor Program

MENTOR APPLICATIONS

owlnetwork.temple.edu



alumni.temple.edu/TPN

Business Meeting Adjournment





Interactive Group Exercise

*Juggling Priorities
in a Virtual Environment:
Elevating Meeting Engagement*

Erica Wexler, Erica Wexler Transforms



*What questions do
you have?*





TUAA - What's Next?

- ◎ TUAA Officer Elections - Electronic, mid-June
- ◎ Summer Planning: Strategic Plan Review against 5 Yr. Plan (2017-2022)
 - Officer Onboarding
 - TUAA Committee Assignments
- ◎ Keeping you informed of University, ACE, and TUAA developments as they unfold -
When We Know, You'll Know!
- ◎ TUAA Virtual Happy Hour - June 3
- ◎ Stay Active: alumni.temple.edu/events

SAVE the DATE:
TUAA Virtual Happy Hour, Wednesday, June 3

