



TUAA Parliament Meeting

Thursday, October 14, 2021

Welcome



Mike Breeze, FOX '96, TUAA President

Contact Info:

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Welcome New Parliament Members



Faculty Representatives:

Scott Gratson, TYL '19, Klein Col. Media & Commun.

Robin Kolodny, College of Liberal Arts

Rafael Porrata-Doria, Beasley School of Law

Student Representatives:

Shanelle Robinson, EDU '22, MCPB President

Bradley Smutek, CLA '22, TSG President

Samantha Quinlan, KLN '21, TSG VP External Affairs

Safaniya Paul, FOX '22, SAA President

Jackson Tyler Smith, EDU '22, SAA VP

Regional Chapter Chair:

Lillia Staverosky-Andrules, TFMA '14, Chicago

Affinity Group Representative:

Catharine Flanagan, FOX '19, Women's Network

Directors at-large:

Harris Chernow, FOX '85, LAW '88

LaShea Davis-Williams, SSW '03, '05

Yvette Nunez, KLN '98

Saadiq Stewart, CPH '12

Tomas Varela, CPH '04

Brittne Walden, LAW '14

School/College Presidents:

Vanessa McGrath, LAW '11

Matt Lista, BYR '13

William Dawson, ENG '15

Rachel Bresler, DEN '14

Alexandra Gibson, TFMA '12

Amina Mayazi Saunders, SSW '98

David Gerson, FOX '16

Agenda



- Welcome – Mike Breeze–5:05–5:15P
- TUAA Business – 5:15–5:30P
 - Approval of Minutes
 - Budget Review
 - DEI Task Force Update
 - Philanthropy Report
- ACE Report – Ingrid Heim – 5:30–5:45P
- Digital Advocacy...Promoting our Brand–Scott Gratson–5:45–6:05P
- Inclusive Language Session–Marie Amey–Taylor–6:05–6:55P
- Closing – 6:55–7:00P

TUAA Business



- Approval of Minutes
- Budget Review
- DEI Task Force Report
- Philanthropy Report

TUAA Budget

Chairperson
Chris Borden,
FOX '08

TUAA FY22 Approved Budget
8/9/2021 10:11:47

	FY21-Budget		FY22- Budget						
	Budget	YTD	Budget	Forecast					Vs Budget
	Approved	Actual	Proposed	Q1	Q2	Q3	Q4	FY (Est)	FY
INCOME									
Auto/ Homeowners Insurance (Liberty Mutual)	\$174,000	\$143,388	\$174,000	43,500	43,500	43,500	\$43,500	\$174,000	\$0
Life Services Fee	110,000	105,246	\$105,000	105,000	0	0	0	\$105,000	\$0
Life Insurance Program (Meyers & Associates)	43,000	44,084	\$47,000	0	0	0	47,000	\$47,000	\$0
Liberty Mutual Sponsorship	22,500	22,500	\$22,500	0	22,500	0	0	\$22,500	\$0
Bank of America	1,100	600	\$500	500	0	0	0	\$500	\$0
Energy Plus	1,000	376	\$400	100	100	100	100	\$400	\$0
Barnes & Noble Commission	500	0	\$500	0	0	0	500	\$500	\$0
Donations	1,000	10,000	\$1,000	0	0	0	1,000	\$1,000	\$0
Checking Account Interest	1,000	753	\$1,000	300	300	200	200	\$1,000	\$0
Temple Abroad Commissions	600	0	\$600	450	0	150	0	\$600	\$0
Lifelock- Symantec	220	0	\$220	70	70	40	40	\$220	\$0
Subtotal	\$354,920	\$326,947	\$352,720	\$149,920	\$66,470	\$43,990	\$92,340	\$352,720	\$0
Transfer of Earnings	107,623	107,623	135,512	0	0	0	0	135,512	0
Total Income	\$462,543	\$434,570	\$488,232	\$149,920	\$66,470	\$43,990	\$92,340	\$488,232	\$0
EXPENSE									
University Events	\$129,000	\$33,700	\$129,000	\$5,000	\$50,000	\$60,000	\$14,000	\$129,000	\$0
Grants Program	35,000	0	35,000	10,000	20,000	5,000	0	\$35,000	0
Student/Young Alumni Engagement	35,000	0	35,000	4,000	1,000	15,000	15,000	\$35,000	0
Athletics Engagement	50,000	0	50,000	5,000	40,000	5,000	0	\$50,000	0
School/College Programming Initiatives	35,000	33,500	35,000	2,000	15,000	15,000	3,000	\$35,000	0
Chapters and Societies Development	35,000	0	35,000	4,000	10,000	13,000	8,000	\$35,000	0
Temple Professional Network	35,000	33,750	35,000	15,000	10,000	5,000	5,000	\$35,000	0
Total Programs	\$354,000	\$100,950	\$354,000	\$45,000	\$146,000	\$118,000	\$45,000	\$354,000	\$0
Board & Committee Meeting Expenses	35,000	0	31,000	1,000	25,000	2,000	3,000	31,000	0
Accountants' Consultation Fees	29,000	21,060	29,000	4,000	0	25,000	0	29,000	0
TUAA Marketing, Branding & Sponsorship	16,500	18,000	24,500	2,000	10,000	10,000	2,500	24,500	0
DE&I Initiatives	0	0	7,500	1,000	2,500	1,000	3,000	7,500	0
Investments Portfolio Management Fees	18,000	0	18,000	0	0	0	18,000	18,000	0
Awards, Gifts, Condolences	1,500	0	1,500	250	500	500	250	1,500	0
Temple TUAA account 47208	0	6,347	4,000	0	2,000	0	2,000	4,000	0
Checking Account Fees/FedEx Fees	543	66	100	100	0	0	0	100	0
Subtotal	\$100,543	\$45,473	\$115,600	\$8,350	\$40,000	\$38,500	\$28,750	\$115,600	\$0
Total Expenses	\$454,543	\$146,423	\$469,600	\$53,350	\$186,000	\$156,500	\$73,750	\$469,600	\$0
Net Income	\$0	\$288,147	\$18,632	\$96,570	(\$119,530)	(\$112,510)	\$18,590	\$18,632	\$0

DEI Task Force Report



- Sharing the Process
- Summary of Where We Are

Task Force Co-Chairs:

Kia Johnson, KLN '86 and Jack Cesareo, FOX '06

Development Committee Report



Lynne Ewell, Chair

Molly Clark Davis, Staff Liaison

Committee Goal

*Through **engagement, education** & the **offering of diverse and meaningful opportunities** to support the University, the Development Committee strives to achieve **100% giving** among members of the following boards:*

TUAA Executive Committee

TUAA Parliament

School/College Alumni Boards

TUYA & SAA

Regional Chapter Boards

TUBAA

Committee Chair, Lynne Ewell, ENG '86

Development Committee Report



GOAL: 100% participation among volunteers

TUAA Parliament	25%
School/College AA Boards	12%
Regional Chapter Boards	5%
TUBAA Board	14%
TUYAA Board	8%

Results as of 10.11.21

Development Committee Report



Upcoming Giving Opportunities

- **Giving TUESday:** *Tuesday, November 30, 2021*

- Global Day of Giving
- www.giving.temple.edu/givingtuesday

#GIVINGTUESday™

- **Calendar Year End:** *Through December 31, 2021*

- Direct mail appeal/email appeal/social media appeal
- Opportunity to make a gift to the designation of your choice
- www.giving.temple.edu



ACE Overview - Ingrid Heim



The Teams:

- **Strategic Engagement (Nicole Steiner)**
- **Alumni Relations (Rosemary Connors)**
 - Chapters & Societies
 - Students & Young Alumni
 - Temple Professional Network
 - TUAA
- **Constituent Engagement (Eliza Stasi)**
 - University Events
 - Advancement Communications
 - ACE Operations & Finance
- **Annual Giving (Molly Clark Davis)**
 - Direct Marketing
 - Programs & Initiatives
 - Stewardship

The Goals:

- **Participation**
 - Alumni, Students, Families, Faculty & Staff, Friends, Fans ...
 - Volunteer, Attend, Give ...
- **Retention**
 - More than one action per year
 - Year-over-year
- **Conversion**
 - Students ☐ Alumni ☐ Guests ☐ Volunteers
 - ☐ Donors ☐ Parents ☐ Advocates
 - ☐ Major Donors ☐ Guests ☐ Volunteers ...

FY 2021 Successes



Strategic Engagement (Nicole Steiner)

- Redefined goal setting & KPIs
- Central ACE calendar and planning
- Strategic data collection, archive & analysis

Constituent Engagement (Eliza Stasi)

- 457,499 (354,328 unique) homepage views
- 605 distinct email comms - 27% open rate
- 50K social media likes, shares, comments
- Hosted 80 virtual events / 5800 + guests
 - Homecoming & Family Weekend
 - Alumni Weekend
 - Global Days of Service
- Increased giving via online event reg by \$12K
- Digital Content Library
- Digital Accessibility Guide
- Alumni-owned Business Directory

Annual Giving (Molly Clark Davis)

- 21 distinct mail appeals
- 42 stewardship comms to 57,609 donors
- \$458K in student support
- Giving Tuesday: 804 donors / \$222,313
- Temple Toast: 1,304 donors / \$468,677
- Employee Challenge: 535 donors / \$123,662
- Piloted Digital Gift Officer program

Alumni Relations (Rosemary Connors)

- New TUA President
- 157 new volunteers / 17 TUYA officers
- Owl Network: 41,523 users
 - 2,748new | 664 class of 2020
- 107 successful mentorships
- Gallery of Success + 30 Under 30
- TUA DEI Task Force

Strategic Engagement (Nicole Steiner)

- Goal setting and KPIs
- Drive, monitor & evaluate **strategic, collaborative planning**
- Constituent surveys & focus groups
- Strategic data collection, archive & analysis

Alumni Relations (Rosemary Connors)

- Volunteer **Governance Project**
- TUAA **DEI Task Force**
- Professional Network expansion
- Regional chapter outreach
- Affinity groups evaluation & expansion
- Alumni benefits program
- Engaging students of all class years

Annual Giving (Molly Clark Davis)

- New vendor partnerships
 - Telefund | Direct Marketing
- Expanded constituent focus
 - Families | Faculty & Staff | Students
- Conwell Society rebrand
- Programs enhancement and growth
 - **Giving Tuesday | Temple Toast | Owl Crowd**

Constituent Engagement (Eliza Stasi)

- University Events integration
- Transition to **in-person + hybrid events**
- **Presidential Inauguration**
- Website audit and redevelopment plan
- Digital (email, social) redevelopment plan
- Brand identity implementation

Strategic Planning

- 12-Month cycle of planning and evaluation

All-Hands Initiatives

- Inauguration activities
- Homecoming & Family Weekend
- Owl Crowd
- TUAA Parliament Meeting
- Giving Tuesday
- Global Days of Service
- Temple Toast
- Commencement
- Alumni Week
- Leadership Summit
- Gallery of Success & 30 Under 30

DEI

- DEI Task Force; IA Liaisons
- Constituent Programming

Messaging Priorities

- Academic Excellence; Community Excellence; Brand Excellence
- Access and opportunity; serving underserved populations; community engagement

Collaborative Partnerships

- President's & Provost's Offices; SM+C; Unit-based partners

Leading By Example

- Give; Volunteer; Connect & Share

ACE FY22 To Date



Events highlights:

- 59 events for more than 5,000 guests!
- **Homecoming** and Family Weekend
- School of **Dentistry Reunion**
- CLA Atrium Opening and **Mazur Hall Naming**
- **Ambler Arboretum** Speaker Series
- **TUBAA** Professional Development Series
- **ProfessionOWL** Series
- LA Chapter: Behind the Scenes at the **Academy Museum**
- LA Chapter: ***Oktoberfest on Saturday***

Communications highlights:

- alumni.temple.edu: 239,219 pageviews
- giving.temple.edu: 45,049 pageviews
- Digital Content Library: 1,600 visitors

Giving Highlights:

- **Annual Giving up in all areas!**
- **Alumni volunteers:** nearly **\$50,000** YTD
(up from just over \$43,000 at this time last year)
- **September's OwlCrowd = \$12,000+** for three key DEI initiatives:
 - Cecil B. Moore Scholars Program
 - Temple Health LGBTQI+ Equality Fund
 - Disability Resources and Services
- **Temple Ambler** campaign for Hurricane Ida relief raised more than **\$12,000**

Alumni and Constituent Engagement



Your TUAA Staff Liaisons:

Ingrid Heim: TUAA Officers, strategic planning, special projects

Christine Brady: TUAA day to day administration, Bylaws, Awards, School and College Presidents Committees

Molly Clark Davis: Development Committee

Rosemary Connors: Alumni Relations Staff, TUAA Support

Rosemary Connors (interim): Temple Professional Network Committee

Shana Mazeika: Regional Chapter & Societies Committee

Mike Minetti: Student & Young Alumni Engagement Committee

Eliza Stasi: Budget, Events, Athletics Committees

Jeanine Falciani and Charles Brown: DEI Task Force

Digital Advocacy - Promoting Our Brand



Scott Gratson, PhD

- Director of undergraduate studies at Klein College of Media and Communication
- Director of the Interdisciplinary Communications program



Words Matter: Guidelines for Inclusive Communication

Marie Amey-Taylor, EdD

- Adjunct Professor, Psychological Studies in Education, College of Education and Human Development, Temple University
- Organizational Development, Training and Diversity, Equity, and Inclusion Consultant





Closing Remarks

Mike Breeze

