



Temple University Alumni Association Parliament Meeting



Alumni Association

February 24, 2018



Agenda

9:00 AM

PART I: UNIVERSITY UPDATES

Jim Cawley | Vice President of Institutional Advancement
Joseph Lucia | Dean of University Libraries

10:30 AM

PART II: VOLUNTEER TRAINING

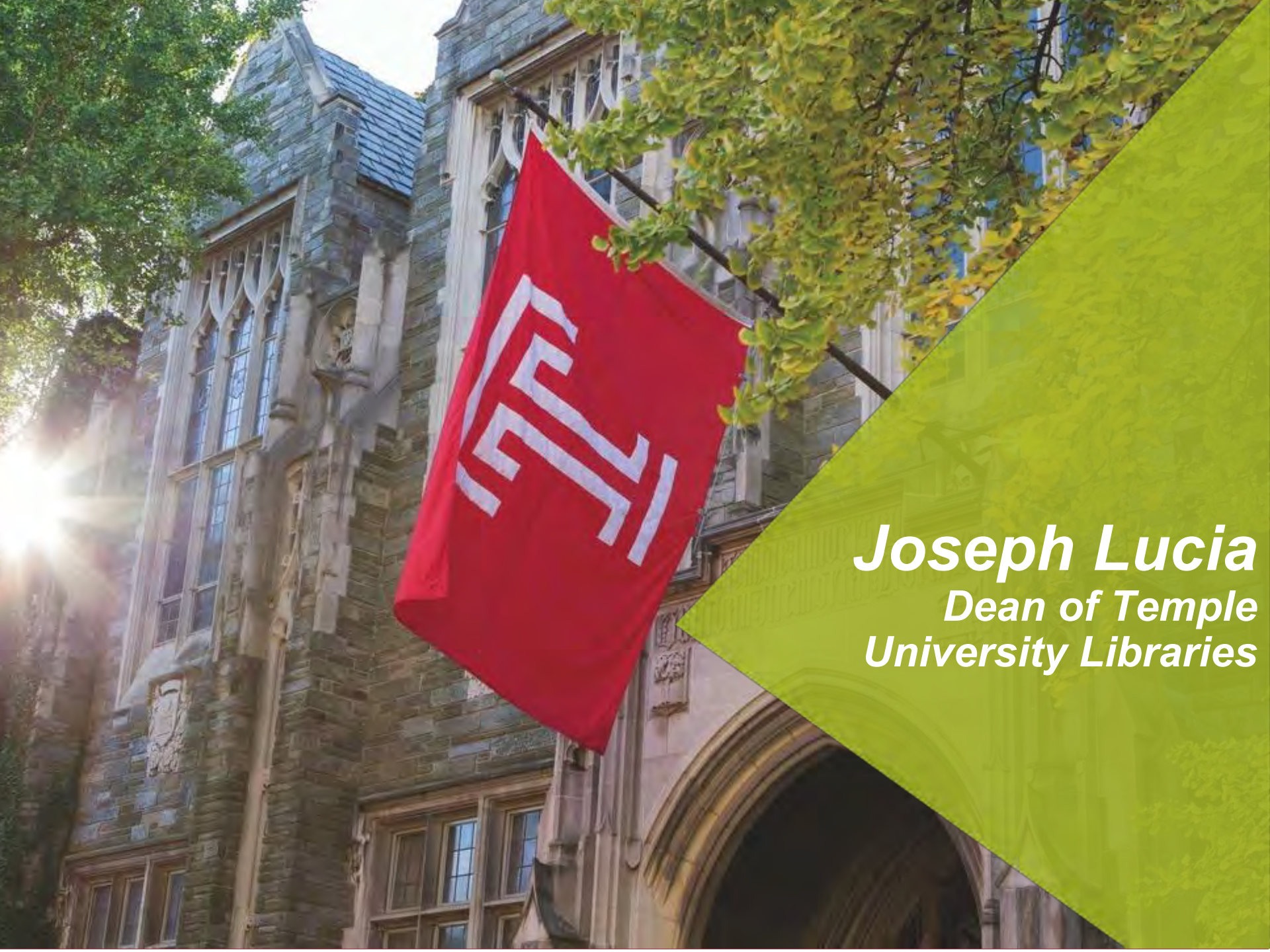
Alumni Engagement = Go + Give + Help

11:30 AM

BUSINESS MEETING & LUNCH

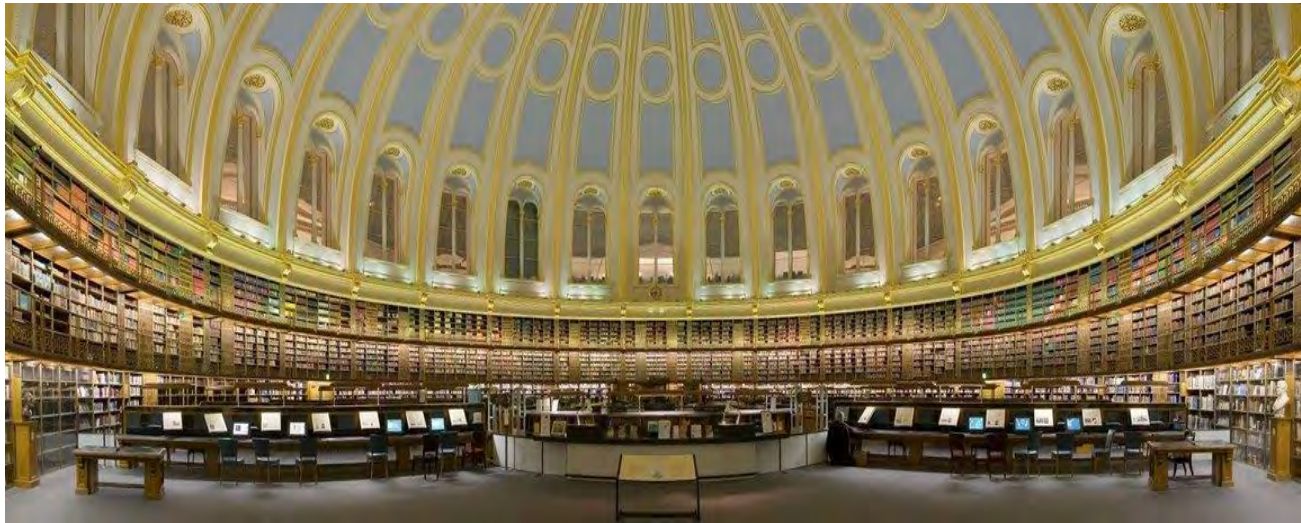


Jim Cawley
***Vice President of
Institutional Advancement***



Joseph Lucia
***Dean of Temple
University Libraries***

Library?





Building on the Classical Age

- Social Nexus
- Public Square
- Mousseion & Inspiration
- Transdisciplinary
- Bridge & Connection Point Between Domains
- Innovation at the Intersections

Big move:

Stimulate the ongoing transformation of the
library from
a repository & study hall

to

an active site of social engagement, discovery
& (knowledge) creation



PREVIOUSLY UNIMAGINABLE. ENTIRELY NEW.

Temple's central library, a strikingly original structure, will be the centerpiece of the campus, a destination for visitors to the city and a model for university libraries in the 21st century.



EMBLEMATIC OF TEMPLE'S FUTURE.

The new library will speed Temple's transformation into one of the nation's great public universities by inspiring scholarship, broadening learning, sparking creativity and building community.







Diverse Ecosystem of Spaces

- Collections (ASRS, Traditional Browsing, SCRC)
- Librarians & Library Staff
- 2000 user seats
- Center for Learning & Student Success (CLASS)
- Writing Center
- Classrooms / Multipurpose Rooms
- 40+ meeting & consultations rooms of various types
- Scholars Studio
- Innovation / Maker Space
- Reading Rooms
- Scholars (Faculty & Grad Student) Gathering Space
- Event & Exhibit Spaces
- University Press
- VR / AR / AI / Emerging Tech Lab









At the Intersection of Technology & Culture

- Historical Perspective from Industrial Age to Digital Era
- Library as connector and as “discovery” environment
- Touchpoint for exploring emerging tech in Artificial Intelligence, Machine Learning, Data-infused inquiry and analytics, including workshops and access to faculty experts
- *Studio* as node in an institutional network of similar emerging facilities in Schools & Colleges and supported by Computer Services
- Broad view of the entire spectrum of knowledge creation, capture, and dissemination at various levels from undergrad projects through advanced faculty research









Library as “commons” and community space

- Site of community engagement
- Sharing and dialogue around faculty and student intellectual & creative work
- Event space on first floor with unique presentation & AV needs
- Exhibit space on first floor, also with presentation & AV needs
- Interactive digital display







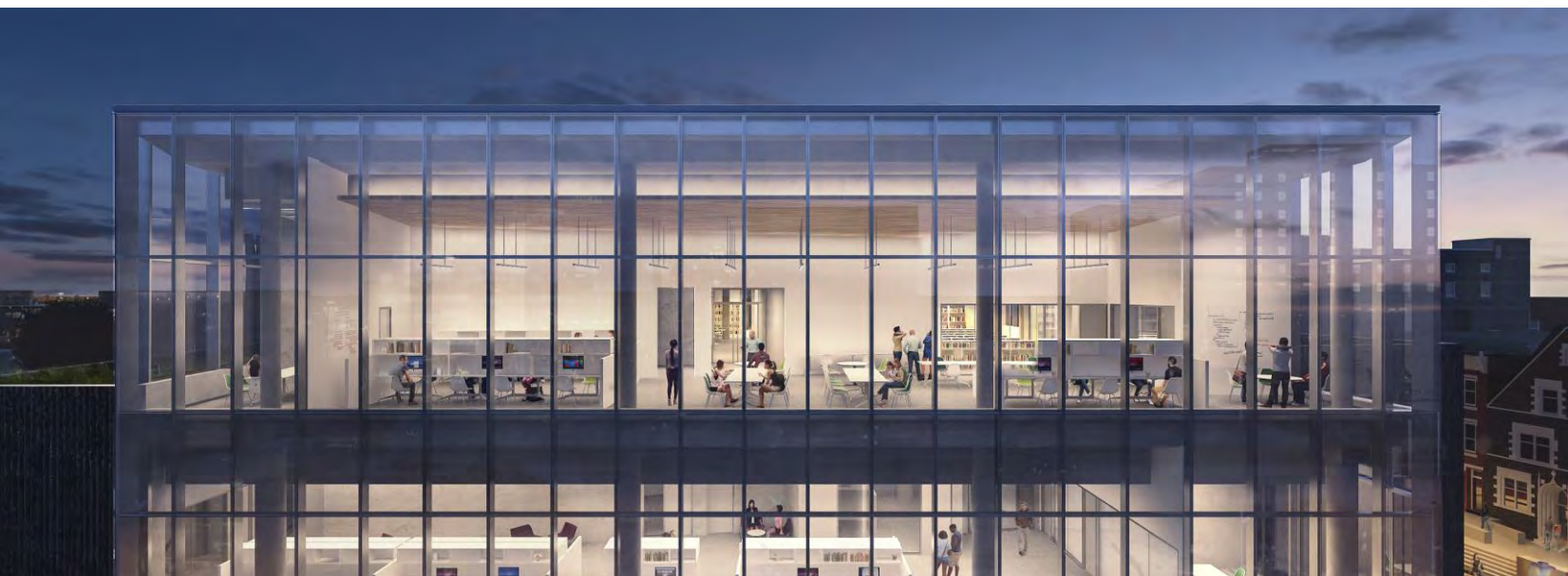




Physical Collections

- Hybrid storage model: ASRS & browsing stacks
- Abiding value of the tactile, contact with physical books and the documentary record
- Special Collections Research Center as a rich and unique learning resource (notably the Urban Archives) integrated into the student experience more richly in new setting
- New discovery, browsing, and recommender infrastructure to support this collections environment, in development with beta release mid-calendar 2018













Signature Facility an “Attractor”

- Rising Prominence & Academic Mission
- Place in the City of Philadelphia
- Signal to Students Beyond our Region
- Enhancement of the Learning Environment
- Architectural & Conceptual Prominence
- Shaping the 21st Century Academic Library

Questions?



Volunteer Training



Alumni Engagement = Go + Give + Help

- ✓ How does Temple measure alumni engagement?
- ✓ What is Temple's strategy for achieving its engagement goals?
- ✓ What is YOUR role in achieving these goals?



Before we begin...

How do you define:

- ☐ Participation
- ☐ Engagement
- ☐ Philanthropy



The background image is a photograph of a Gothic-style building, likely a university hall, with a large flag flying in front of it. The flag has a dark field with a white geometric pattern. The entire image is overlaid with a semi-transparent red filter. The text is centered in the upper half of the image.

***What are our
alumni engagement goals?***

Alumni Engagement Score



GO



GIVE



HELP



FY18 Alumni Engagement Goals

Description	FY18 Goal	FY18 YTD*	% of Goal
Alumni Engagement Score*	10.75%	6.13%	---
Unique alumni attendees [GO]	3870	2095	54%
Young alumni	1460	710	49%
Student	2250	2648	118%
First time attendees	1160	464	40%
Alumni Volunteers [HELP]	--	526	--
Alumni Volunteer Participation [GIVE]	60%	42%	--

**Percentage of solicitable alumni.*

Alumni Engagement Score



GO



GIVE



HELP



What is Annual Giving?

Affordable and repeatable gifts.

At Temple, gifts up to \$49,999.

Solicited in bulk – large mailings, emails and student calling (Telefund) are the most common vehicles.



Why do we need Annual Giving?

Annual gifts provide real-time spendable cash.

That money can be used at the discretion of the area to which the gift was given – vital to the President, the deans, the heads of units, Finance and Administration and more.

Annual Gifts are what we call “restricted unrestricted” gifts.



What do Annual Gifts fund?

- ✓ Maintenance and upgrading of buildings
- ✓ Upgrading classrooms and laboratories
- ✓ Upgrading technology
- ✓ 10 gifts of \$100 can offer an annual scholarship
- ✓ \$50 can fund a student career event
- ✓ Six gifts of \$250 provide a community education workshop
- ✓ \$50 can buy a text book



Annual Giving Societies

Donors up \$1 - \$999.

Donors who make gifts of \$1,000+ become members of the Conwell Society.

*Donors up to 5 years out can join Conwell for \$250, and
Donors 6-10 years out can join for \$500.*

Any donor that gives for 25 cumulative years at any amount is a member of the Wachman Society.



What is Participation?

“Participation” is the number of alumni who give divided by the entire solicitable alumni base. We have to know your address for you to be solicitable – knowing a phone number and/or email is not sufficient.

This year, our solicitable base is 302,504. (Entire base = 324,259) and our donor goal is 22,000 alumni.

7%



FY17 Participation Rates

Temple:	7.12%
Penn State:	11%
Univ. Pittsburgh:	10.5%
Univ. Florida:	16%
Univ. Houston:	12%
Rutgers:	8%



Why does participation matter?

- ✓ Show of support, investment and belief in the school.
- ✓ Desire to see the school get better and better
- ✓ Example to other alumni and particularly current and prospective students – the donors of today and tomorrow.
- ✓ Donors want to engage in the school's success
- ✓ Greatness and reputation
- ✓ Rankings



Case Study





Global Days of Service

Tuesday, April 24

American Red Cross Blood Drive | Main Campus

Wednesday, April 25

SHARE Food Program | Hunting Park Avenue

Thursday, April 26 - TEMPLE TOAST

Friday, April 27

Duckery Public School | 1500 Diamond Street

Saturday, April 28

North Broad Renaissance | North Broad Street

For a full list visit: alumni.temple.edu/GlobalDays

Global Days of Service



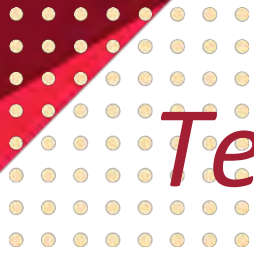


Temple Toast

What is Temple Toast?

- 24 Hour Giving Campaign
- \$110,000 from 1,215 members of the Temple Community in 2017

Why Alumni Relations and Annual Giving Partnered on these initiatives?



Temple Toast

GIVE NOW 

Dollars Raised

\$110,827

Donors

1215

LEADERBOARDS

CHALLENGES

SOCIAL

FAQ

LEADERBOARDS

Boyer College of Music and Dance	\$975	14	GIVE NOW
College of Education	\$3,718	56	GIVE NOW
College of Engineering	\$650	6	GIVE NOW
College of Liberal Arts	\$1,893	23	GIVE NOW
College of Public Health	\$4,945	14	GIVE NOW
College of Science and Technology	\$786	14	GIVE NOW
Fox School of Business and Management	\$7,227	31	GIVE NOW
James E. Beasley School of Law	\$5,120	17	GIVE NOW
Klein College of Media and Communication	\$3,225	17	GIVE NOW
Kornberg School of Dentistry	\$136	3	GIVE NOW
Lewis Katz School of Medicine	\$1,321	11	GIVE NOW
School of Pharmacy	\$6,925	7	GIVE NOW



How can you participate?

Give

- Health
- Hunger
- Environment
- Education
- School/College
- Athletics

Spread the Word

- Social Media
 - #TempleToast
 - Facebook
 - LinkedIn
 - twitter
- Email

The background of the slide is a photograph of a large, ornate university building with Gothic architectural features, including pointed arch windows and stone carvings. A large flag is flying in front of the building, featuring a prominent white stylized 'S' logo on a dark field. The entire image is overlaid with a semi-transparent red filter. The text is centered and written in a bold, italicized, black sans-serif font.

***What are our
alumni engagement goals?***

***What is your role in achieving
these goals?***



Table Discussion

- How can you be an ambassador for Global Days & Temple Toast?
- How will you engage your alumni organizations with these initiatives?
- How might the GO-GIVE-HELP model inform your group's engagement efforts moving forward?



Business Meeting



Business Meeting

- TUAA Committee Reports
- Investments/Budget Review
- Communications Committee Report
- Office of Alumni Relations Report
- Parliament Q and A
- Office Hours



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

Investments Portfolio

Portfolio Summary by Asset Class

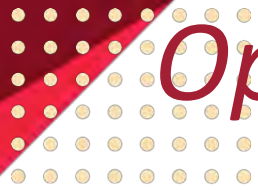
TEMPLE UNIVERSITY ALUMNI ASSOCIATION POR

As of February 20, 2018



Details

Description	Market Value	Tax Cost	Annual Income	Yield
Cash	68,234	68,234	293	0.4%
Equity	1,976,606	1,634,209	31,259	1.6%
Fixed Income	704,552	729,614	19,701	2.8%
Total	2,749,392	2,432,058	51,253	1.9%



Operating Budget - Income

TUAA FY18 BUDGET	Approved	Quarter 1	Quarter 2	Estimated Revenue
INCOME	2017-2018	7/1-9/30/17	10/1-12/31/17	
Operating Income				
Checking Account Interest	\$ 300.00	\$ 130.63	\$ 217.67	\$ 420.00
Life Insurance Program	\$ 35,000.00			\$ 35,000.00
Auto/Homeowners Insurance Program	\$ 250,000.00	\$ 46,725.13	\$ 56,140.15	\$ 150,000.00
Short Term Medical Insurance Program	\$ 1,500.00			\$ 1,500.00
Life Service Fees	\$ 105,000.00	\$ 112,440.00		\$ -
Temple Abroad Commissions	--	\$ 409.50		\$ -
Life Lock	\$ 1,000.00	\$ 53.92	\$ 83.81	\$ 862.27
Donations	\$ 1,000.00			\$ 1,000.00
Long Term Care	\$ 1,000.00			\$ 1,000.00
Energy Plus	\$ 2,000.00	\$ 432.49	\$ 358.30	\$ 1,209.21
Liberty Mutual Sponsorship	\$ 17,500.00	\$ 22,500.00		\$ -
Alumni Association Returned Grants	\$ -			
Subtotal:	\$ 414,300.00	\$ 182,691.67	\$ 56,799.93	\$ 190,991.48
Other Income				
Transfer of Earnings	\$ 102,400.00			
Current Portfolio Value: \$2,749,392 as of 2/20/18				
TOTAL INCOME	\$ 516,700.00			

Operating Budget - Expenses

TUAA FY18 BUDGET	Approved	Quarter 1	Quarter 2	Estimated Expense
EXPENSES	2017-2018	7/1-9/30/17	10/1-12/31/17	
Operating				
Accountants' Consultation Fees & UBIT	\$ 23,000.00		\$ 12,000.00	\$ 11,000.00
Investments Portfolio Management Fees	\$ 14,000.00	\$ 4,115.92	\$ 4,509.32	\$ 5,374.76
Checking Account Fees/FedEx Fees	\$ 200.00	\$ 87.58	\$ 4.90	\$ 107.52
TUAA Representation at University Events	\$ 15,000.00		\$ 6,000.00	\$ 9,000.00
TUAA Advertising/Marketing	\$ 5,000.00			\$ 5,000.00
Board & Committee Meeting Expenses	\$ 35,000.00	\$ 5,405.40	\$ 14,671.51	\$ 14,923.49
TUAA Athletics Tickets	\$ 8,000.00	\$ 7,492.00		\$ 508.00
Awards, Gifts, Condolences	\$ 1,500.00	\$ 84.43	\$ 68.89	\$ 1,346.68
Subtotal	\$ 101,700.00	\$ 17,185.33	\$ 37,254.62	\$ 47,260.45
Programs				
Grants Program	\$ 35,000.00		\$ 13,000.00	\$ 22,000.00
Alumni Weekend - University Events	\$ 215,000.00	\$ 876.96	\$ 34,513.26	\$ 179,609.78
Temple Professional Network/Career Services	\$ 25,000.00	\$ 7,052.44	\$ 6,923.62	\$ 11,023.94
Student/Young Alumni Engagement	\$ 35,000.00	\$ 1,110.00	\$ 3,285.25	\$ 30,604.75
Athletics Engagement	\$ 35,000.00	\$ 750.00	\$ 26,162.39	\$ 8,087.61
School/College Programming Initiatives	\$ 35,000.00		\$ 5,843.66	\$ 40,843.66
Chapters and Societies Development	\$ 35,000.00		\$ 10,119.64	\$ 24,880.36
Subtotal	\$ 415,000.00	\$ 9,789.40	\$ 99,847.82	\$ 317,050.10
TOTAL EXPENSES	\$ 516,700.00	\$ 26,974.73	\$ 137,104.44	



***Communications
Committee Report:
Joe Bishop***
FOX '09

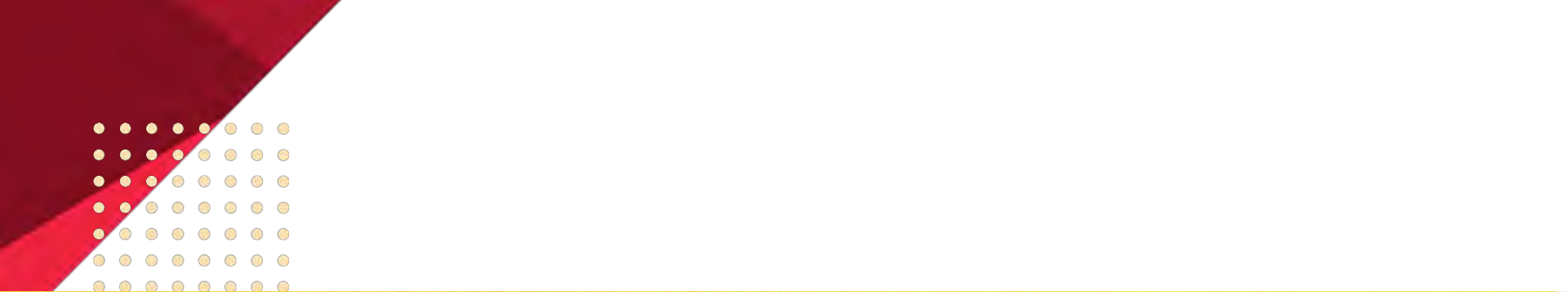


Communications / TUPortal Project

Objective

To create an information hub for TUAA leaders, including:

- University and alumni news
- Event information and registration
- Alumni leader tools and resources
- alumni.temple.edu/TUAANow



London 39°F Rome 46°F Tokyo 30°F



February 23, 2018 11:07 AM

Log Out

Good morning, Christine!

- Home
- Staff Tools
- Banner
- Budget and Finance
- Research
- Help

TUportal / Home

Search

Enter Keywords

For... Where... ▼

TUapplications

- Blackboard
- Canvas
- Self-Service Banner
- TUmail (Exchange / Gmail)
- Google Apps
- OWLbox
- TUlibrary

Announcements

Announcements

All ▼

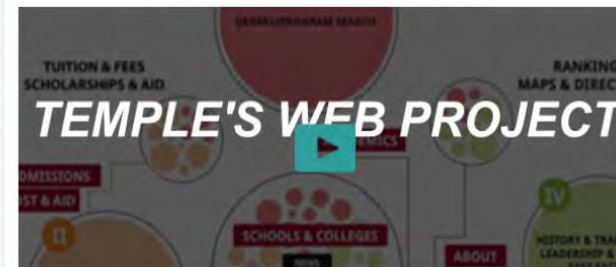
Subject

- > Employee Discounts on Campus Summer Programs for Youth
- > Employee Discounts on Pre-College Campus Programs
- > Internationalization Grants for Faculty and Staff
- > New University Policy
- > Blackboard End of Life June 1, 2018

Show Hidden

Spotlight

Temple's digital landscape is being reimagined with a research-based, user-first approach to content and design.





***Office of Alumni
Relations Report:
Lisa Vaccarelli***



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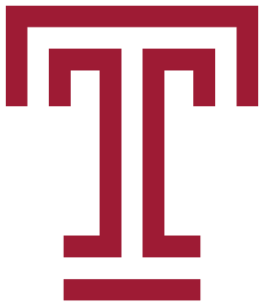
FY18 Programmatic Priorities



Cultivate a ***culture of philanthropy*** among alumni volunteer leaders.



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



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



TU Grad Countdown

SEPTEMBER

- Welcome Back Event



OCTOBER

- Homecoming



NOVEMBER

- Day of Giving



FEBRUARY

- Philanthropy Week



JANUARY

- 100 Days Till Graduation Event



DECEMBER

- Holiday Concert



MARCH

- GradFest



APRIL

- Global Days of Service & Temple Toast



MAY

- Alumni Block Party

Student Leadership Reception

WHEN: Thursday, February 22

WHERE: Feinstone Lounge,
Sullivan Hall

WHO:

- Student Leaders
- TUAA Leaders
- University Leaders





Global Days & Temple Toast

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American Red Cross Blood Drive | Main Campus

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Duckery Public School | 1500 Diamond Street

Saturday, April 28

North Broad Renaissance | North Broad Street

For a full list visit: alumni.temple.edu/GlobalDays



Alumni Weekend | May 17 - 19

Temple Story Slam | Thursday 5/17

Partnership with TFMA and First Person Arts

Temple Made Happy Hour | Friday 5/18

Lead & Learn Brunch | Saturday 5/19

Diner en Cherry | Saturday 5/19

For a full list visit: alumni.temple.edu/AW18

New Hires



Lucy Mason
Associate Director
Chapters & Societies



Katie Sampson, BYR '11
Assistant Director
Students & Young Alumni



Temple University Alumni Association Parliament Meeting



Alumni Association

February 24, 2018