

Administrative Activities Review (AAR)

Advancement: Development and Alumni Relations

Thank you for the opportunity to reflect on the mission of the Division of Advancement made up of development and alumni relations. Outlined below are the services we provide, our strengths and challenges, and your future plans.

I. Basic Facts and Description of the Unit.

- a. Mission and goals.** Designated by The University of Akron Board of Trustees as the fundraising entity for the University and directed by its priorities, the department of development's mission is to maximize private sector support for the University by: development of comprehensive strategies and programs for building lifelong donor relationships; preserving the purchasing power of gifts and providing a major source of consistent, ongoing support to the University; administering these resources for the benefit of the University in a way that inspires continuing trust and commitment from donors; and creating an environment in which philanthropy is part of the university's fabric and in which it will thrive into the future. Alumni relations is a constant source of connection, a bridge not only to nurturing collegiate past but as a connector, advancing relationships, and developing new outreach initiatives that will positively shape futures in new ways.
- b. Services.** Fundraising, data management, alumni and constituent communication, events, volunteerism
 - Fundraising:
 - **Critical partners:**
 - **University leadership including deans and faculty**
 - **Alumni**
 - **Friends (non-alumni)**
 - **Corporations, organizations, foundations**
 - Customers
 - **Students**
 - **University leadership including deans and faculty**
 - **Alumni**
 - **Friends (non-alumni)**

- **Corporations, organizations, foundations**
- **Key performance analysis.** Development progress is tracked via a dashboard of attainment and progress that is produced monthly. The fiscal year 2018 and 2017 dashboard are attached. Each development officer has an attainment goal tied to their annual performance.
- **Brief assessment.** Our greatest challenges are (1) the size of our team and (2) the age and lack of sophistication of our database (peoplesoft). Our greatest opportunity at this time is the concept of the next major campaign for the University.
- Alumni Relations:
 - **Critical partners:**
 - **University leadership including deans and faculty**
 - **Alumni**
 - **Corporations, organizations, foundations**
 - Customers
 - **Students**
 - **University leadership including deans and faculty**
 - **Alumni**
 - **Key performance analysis.** Alumni Relations performance is based on several factors including overall attendance at events and engagement in UA which includes alumni giving. A three- year record of alumni giving is attached. Attendance at alumni events for FY18 was not yet compiled, but overall we have seen great response to our new alumni socials around the country.
 - **Brief assessment.** Our greatest challenges are (1) the size of our team and (2) the age and lack of sophistication of our database (peoplesoft). Our greatest opportunity at this time is to capitalize on the momentum of alumni engagement and build upon it. One item we desire to bring back is an alumni magazine which was phased out several years ago due to budget constraints.

c. Resources.

- **Personnel.** An organizational chart is provided. Listed below is a table of our team.

Name	Title	Key function	type
Winifred Alexander	Coordinator, Administrative Services Sr	Administrative support, budgets,	Staff
Anthony Antonucci	Asst. Dir, Development	Prospect portfolio development	CP
Laura Austin	Asst. Dir, Research	Research	CP
Tracey Brown	Donor Stewardship Specialist	Administrative support; stewardship administrative	Staff
Brittany Cochran	Asst. Director, Alumni Relations	Alumni events, volunteer coordination	CP
Kim Cole	VP, Development and Exec Dir UA Foundation	Strategy development, fundraising, management, directs foundation board	CP
Will Cole	Director, development	Major Gifts	CP
Anthony Colucci	Director, Donor Relations	Donor stewardship	CP
Paula Conger	Asst. Dir, Research	Research; proposal writing; bios on prospects for president's office/leadership	CP
Andreas Ellis	Director of Development and Alumni Relations, Law	Major gifts, overall coordination of development and alumni functions in the School of Law	CP
Tim Faix	Asst. Dir, Athletics	Athletics fundraising	CP
Tonia Ferrell	Director, Prospect Development and	Prospect portfolio management,	CP

	Campaigns	campaign data management, supervises research staff, peoplesoft trainer	
Chris Franz	Administrative Assistant, Sr.	Administrative support, alumni relations	staff
Megan Hopper	Director, Development, College of Engineering	Fundraising, college of engineering; supervises asst. director of development staff	CP
Eric Jezewski	Asst. Dir, Development	Fundraising, pipeline giving, national generalist	CP
Lia Jones	Director, Center for Gift and Estate Planning	Set structure for effective gift and estate planning center; garner estate gifts	CP
Claudia Kaeberlein	Director, Annual Giving	Manages all channels of annual giving (direct mail, telemarketing, online, mobile)	CP
Kathy Kline	Administrative Assistant	Administrative support; database updates	Staff
Willy Kollman	Asst. VP, Alumni	Management of alumni relations sector of government relations	CP
Carolyn Mehl	Executive Dir, Gift and Estate planning	Part-time with retirement on Dec. 31 2018; gift and estate planning	CP
Tamara Mora	Director, Development	Fundraising;	CP

Ellen Perduyn	Asst VP, Corp and Foundation Relations	Oversight of strategy with major corporations and fdns; fundraising	CP
Barbara Pizzute	Coordinator, Foundation Relations	Administrative support to VP, coordination of all UA Foundation business/meetings	Staff
Kristi Reese	Assoc Director, Alumni Relations	Alumni events, alumni merchandise, Zippy program, travel	CP
Eric Ryan	Asst. Dir, development	Fundraising; early pipeline	CP
Lisa Sabol	Director, Development	Major gifts	CP
Terrie Sampson	Director, Development Stewardship	Management of overall endowed scholarship distribution; donor stewardship protocol; records and gift processing oversight	CP
Jason Sanders	Asst. Dir, Development	Fundraising, early pipeline	CP
Cynthia Sheeks	Director of Development, College of Business Administration	Major gifts, CBA	CP
Tari Spataro	Coordinator, Gift Processing	Gift processing and gift records	Staff
J.D. Spinner	Director of Development	Writing, design, prospect management	CP
Ursula Stacks	Manager, Data Systems and Services	Alumni and donor records oversight; mailing/email/data list management;	CP

		data integrity	
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- **Financials.** Unit budget history (and revenues, if applicable) over the past five years. Briefly explain key takeaways (e.g., causes of budget deficits, trends in expenditures).
 - FY 15 - \$2,774,178
 - FY 16 - \$1,038,273
 - FY 17 - \$610,092
 - FY 18 - \$915,373
 - FY 19 - \$869, 604

- **Equipment and technology.** The primary equipment and technology that is crucial to our work is software, particularly our database, online giving and mobile giving portals, as well as alumni engagement software. We are in high need to upgrade our database from peoplesoft to a system designed for advancement, with an RFP currently being drafted. We are in need of a more sophisticated alumni engagement / annual fund online system as well.
- **Space.** The offices of development and alumni are on the second floor of InfoCision Stadium, space that we built to suit our needs in 2012/13. The space is designed to serve the needs of our constituency and staff.

II. Future Plans. The Division of Advancement is preparing for the next major campaign of the University along with the Sesquicentennial Celebration in 2020. Through programming and campaign strategy, these University milestones will propel engagement and giving to higher levels.

- a. **Potential changes.** Our division continues to evolve to best integrate a seamless connection between pride of alma mater and giving, as well as strengthening our position in the region among corporations and foundations. The stabilization of University leadership will positively impact this process.
- b. **Trends.** There are many factors that influence philanthropy to UA. Our aging alumni base is a reminder that we must focus signification efforts on gift and estate planning communications to capture the transfer of wealth. As world trends and industry challenges and opportunities arise, we must always be ready to help advance the University in significant ways. As our city grows and shifts its focus, we must remain a reliable partner. And finally, as our young alumni base builds its new relationship with alma mater, we must communication in ways



that reaches them where they are, not where we are. This translates in increasing our ability to communicate in new channels.