

University Relations, Alumni and Development Lead Meeting
August 29, 2019
3:00 – 4:30 pm via Zoom

Attendees:

Megan Riebe	Kenrick Mock	Jeff Jessee
Tanya Pont	Megan Olson	Brian Ibsen
Kirsten Olmstead	Karen Markel	Mark Hermann
Mathew Mund	Jessica Post	Keni Campbell
Lynne Johnson	Susan Foley	Ronalda Cadiente Brown
Kate Ripley	Alison Carter	Michelle Renfrew
Michelle Rizk	Kelly James (scribe)	Fritz Freudenberger
Marmian Grimes	Theresa Bakker	Emily Drygas
Denise Runge	Monique Musick	Robbie Graham

Background and review of the process – Susan Foley – The UA Foundation Board of Directors, as part of their work they have been very interested in development for a long time, recognizing how important development is to all of the good that is done by way of the UA Foundation. There has been concern for some time whether development efforts were brought forward in a way that would bring the best fundraising results. The committee, convened by the board chair could take a look at the system and make recommendations. A national expert from the Association of Governing Board Consultants, head of the University of Maryland Foundation, interviewed the chancellors, president, VP Rizk, Development leads, Development officers and staff at UA foundation. He met with the committee in person and went over development structure formats. The committee came up with a format, a semi autonomous format. The Development team would be lead and managed at the Foundation, but doing their work on the campuses and in the community. This format was also recommended by the UA Foundation Board. The Board has representatives from some of our largest and most loyal donors and partners.

The recommendation was formally presented to the president and was directed that they would go forward with this format with Susan Foley leading the effort. President Johnsen asked that a high-level summary for the process be provided, which was presented yesterday and will be presented to the councils today. The meeting today is to receive input on the process. Development efforts will still be carried out at the university. There is no plan for all of the Development officers to be in one building in either Anchorage or Fairbanks. We need to be in both locations to continue interacting with donors in both locations. There is a need to extend our presence in more communities. The experts believe there is more that we can do and will be beneficial to everyone. The deans that have dedicated development officers can be a part of a new team and still do work on behalf of the deans they were reporting to, but will be asked to broaden their scopes. They will expand to work with other fundraisers within the system. The expectation is that everyone knows a little bit about what is going on within the system. There will be subject matter experts that will work collaboratively with donors and the university.

Each area is going to benefit from this, and that is the reason it is being recommended. It is not to reduce what is coming in the door.

Concerns:

- Concern of whether or not the evaluation of the staff and their performance was provided
 - o Susan asked that it not be provided in the report because it is her opinion that the current fundraising results are not the result of anyone malfeasance and are merely due to circumstances.
 - o Does not want it perceived we have had expert advice on how best we should be organized and also feels there are areas that may be causing low performance that were not evaluated by the expert.
- Concern of being told that they are not performing up to their potential, but not being shown the backup for this evaluation, at the same time being convinced that this new path is better for us. Have had no opportunity to look at the information regarding the current system and did not get to review what the potential options were until after a decision had been made.
 - o Susan – no information has been sequestered.
- Concern of how we can do better and how can all of the stakeholder input is considered before decisions are made before decisions are made and a reorganization of the system.
 - o The decision has been made by the president with the recommendation of the Foundation Board of Directors

Additional background and history – Megan Riebe - Outside expert was working with Foundation back in 2015/2016 to create a strategic plan for the Foundation working with the Board. The result of the strategic plan was that the Board was very interested in leading an effort to conduct the first ever system wide philanthropic campaign at this university. The planning started in 2015 and since then have done many different sets looking at whether we were ready as a system, is it feasible, what does the donor pool look like, are there enough people out there with the ability to make a major gift in the campaign and the affinity. An assessment of the Development team was performed and revealed data looking at our potential and whether we were able to do that work in our current structure. The initial report back in 2016 recommended basically a very similar structure where there would be direct reporting lines to the Foundation for the major gift officers and reporting lines to the universities. Since then, we have also looked at our annual giving program in depth, our donor relations program in depth, and events and services in depth. The reports are available. All reports show that our current structure may be holding us back. Deans and Directors that are able to employ a Development officer are at an advantage to those that are not.

Fairbanks has a centralized development officer system, generalists, who can speak to all areas of the university. We are also looking at and modeling other successful universities and a structure of that has been proposed.

Concerns of the deans:

- Not against centralization – historical competition between campuses has been detrimental to both sides (mutually assured destruction scenario). Key to success has been to partner with a development officer who would become very knowledgeable

- about the programs, understand what the customer wants, adapt to that and then ask for funding. There is concern a generalist will not provide the same level of service for the department. Does not get information timely or in a helpful format from the Foundation.
- Concerned there wouldn't be a deep familiarity with the college and faculty required for successful fundraising.
 - Student groups do fundraising and need someone to manage that process.
 - Questions how the new structure will improve things in comparison to the existing structure utilizing metrics, goals and expectations. Would like more development time. Has a half-time development person. Would be able to do more with more dedicated time.
 - Familiarity with the department is beneficial with a dedicated development officer. Does not want to lose their dedicated development officer.
 - CTC at UAA had a generalist, but never had the time for someone to develop a deep understanding of all of the areas of programming. Found funding for a dedicated half time person and it is starting to pay off. Conversations are deepening. Concerned about going back to a generalist and losing the progress made.
 - Culture of accountability is important for our success. There has been no evaluation. There needs to be goals. Being managed by foundation, must insist on accountability and transparency.
 - Concerned the priority of the department is higher than the prior of the Foundation
 - Concerned someone is going to talk to their donors about fundraising and the potential for breakdown of relationships with the corporate partners
 - Replacing what we have when it is not broken is concerning
 - Concern about the functions of the Foundation and how it is performing with the core mission – affecting people's confidence. People are not having basic needs met.

Comments in response:

- Model – University of Colorado Anschutz Medical Campus – has had phenomenal results.
 - o Instead of a half-time fundraiser, there will be a dozen fundraisers able to speak on behalf of the department.
 - o There will also be internal development officers deeply familiar with the departments. They will partner with the external fundraisers to get them information they need when a donor expresses an interest in an area.
 - o This model works well for private donors. Corporate and Foundation specialists will specialize in a couple of areas. This is not completely worked out yet. Will have multiple people available.
 - o Very donor-centric process to find what their interests are and represent the broader scope.
 - o More people advocating for the college or department
 - o Ability to cross over departments/colleges with donor interests
 - o Donors want a higher level view – what impact can the donor have on the university – higher level recognition and impact – not limited to campus
 - o External people can focus on donor work. Administrative work divided out.
 - o Consistency of expectations across the system for development officers – pay, etc.
 - o Collaboration will be encouraged throughout the system.

- Internally focused people would be assigned departments – current staff would stay with their current departments. Corporate accounts would be assigned specific people
- Development officers from UA have been sent to Colorado to learn this model.
- Internal person is the content expert – help the external person develop the proposal and gather whatever information they need – be the content expert.
- Still evaluating how many people will be needed to cover all of the areas. With all of the resources available we will still be understaffed.
- How many current staff has salaries supported by multiple units? All of the development officers at UAA have funding from each of the 5 development offices.

Concerns continued:

- Culture of accountability is important for our success. There has been no evaluation of the goals of planned gifts, principle gifts. If this is to be managed by the Foundation, we have to insist on the highest level of professional management that we can get, regular and transparent accountability for everything that happens. Also accountability from the deans and directors.
- Concerned about how high up the chain the departments would have to go to initiate a department campaign.
- Concerned relationships with industry partners could be damaged under the new structure. Does not want partners to be contacted without the dean's involvement to continue to build trust and relationships.
- Does not want a one-size-fits-all structure. Do not change what works.
- Concern of how many areas a development officer would have to cover.
- How many of the current staff are funded by multiple departments?
 - All Development officers have shared funding between the colleges and a central funding at UAA. UAF, SOM pays for part of their DO, but the rest are paid out of the central fund.
- Will the dean/director have a part in the hiring of their DO and will they have a financial responsibility to that position?
 - Details are not developed at this time, but is an area of consideration. The vision is the DO currently working at the campuses would continue to work at the campuses. They would not be moving to radically different environments.
- Still need to be integrated. We do not want to build a silo. Integrate Development and Alumni.
 - Constant communication
 - University Relations support
- Concern about how the process is going to happen. Does not want it to be like HR's transition (pink slips)
 - We are asking for a different approach
 - Open approach

Comments in response continued:

- Corporate giving is specialized and does not need to change
- Anticipating keeping current development officers if they choose to stay

- The key is internal people in support positions and paired with external support positions.
- Internal position would be the content expert and work closely with academic leaders.
- External position would develop the proposal and present information to the donors.
- Currently working on evaluating the numbers needed to cover areas. Will still be understaffed, so will need to be
- Emily Drygas is currently using this model informally for 16 years. It works well. The internal person collects information from our colleagues while someone is out simultaneously fundraising and writing proposals. The external person is able to focus on fundraising and not get tied up on the internal processes.
- The plan is to have corporate specialists paired with an internally focused person
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Transition period:

- Communications – Help is available from the central communications office. If additional resources are needed, contact University Relations.
- Who to go to for answers – points of contact
- Susan will be meeting with the Provost Councils to review the proposal.
- Provide information about the new positions
- Having an idea of where we are going as we go through the process with development
 - o Avoid duplication of efforts (positions)
 - o Who updates the website, who makes the fliers for events, etc during the transition?
- Define our needs
 - o Solicit where are the needs from the student’s perspective.
 - o Donors can then hear the stories of the student’s needs.
- Remaining transparent in the process