

Centers & Institutes Directors

Minutes: May 4, 2012

C&I Directors Attending:

- Ms. Lisa Bash-Ward, Intercollegiate Athletic Institute for Sports Camps
- Dr. Robert Boldin, Small Business Incubator
- Dr. Beverly Chiarulli, Archaeological Services
- Dr. Ed Donley, Software Development Center
- Mr. Donald Gamble, Center for Career & Technical Personnel Preparation
- Dr. Dennis Giever, Center for Research in Criminology
- Mr. Barnett Knorr, Center for Career & Technical Personnel Preparation
- Dr. Krish Krishnan, Center for E-Commerce & Technology Support
- Dr. Erick Lauber, Digital Media Institute
- Dr. Christoph Maier, Applied Research Lab
- Mr. Ronald Moreau, Government Contracting Assistance Program
- Dr. Donald Robertson, Center for Applied Psychology
- Dr. Timothy Runge, Child Study Center and Center for Gifted Education
- Ms. Karen Stein, Speech, Language & Hearing Clinic
- Mr. Robert Wilson, Institute for Mine Mapping, Archival Proc & Safety

Others attending:

- Dr. Hilliary Creely, Asst Dean for Research, School of Graduate Studies and Research
- Mr. William Spedel, Vice President for University Advancement

- **Updates**

- Mr. Donald Gamble, Director of the Center for Career & Technical Personnel Preparation, will retire on June 1. His replacement is Mr. Barnett Knorr.
- Dr. Creely reviewed the group's activities for the 2011-2012 academic year:
 - Five-year reviews were completed for 14 centers. During academic year 2012-13, centers in the College of Health & Human Services, Eberly College of Business and the School of Graduate Studies & Research will be reviewed.
 - Six centers were awarded assistance with updating their websites. Mr. John Hepler, from the School of Graduate Studies & Research, will continue to work through June with these centers.
 - Nine centers were awarded spring grants for travel and special projects, for a total of \$8,000. Ms. Stein said that her program's accreditation team remarked on the helpfulness of these grants each spring to keep their clinical materials updated.
 - The request for FY 11-12 annual reports will be sent to all center directors soon. Dr. Creely wants to move the due date up to mid-August this year, and will send an email to directors with that request.
 - Directors should not feel constrained by the template provided. The center's annual report should showcase your center's strengths.
 - Reports submitted after the due date will not be accepted this year.

- **New Business - Presentation by Mr. William Speidel, Vice President for University Advancement**
 - Dr. Creely introduced Mr. Speidel , CFRE (Certified Fund Raising Executive), who has been at IUP since February 2011. Before coming to IUP, Mr. Speidel worked at the YMCA in Clarion, Butler County Community College, and Passavant Hospital.
 - Mr. Speidel presented the attached slideshow.
 - Dr. Krishnan mentioned that there are many international alumni who are not being asked to contribute.
 - Mr. Speidel asked that centers contact his office before approaching a corporation in order to coordinate IUP's efforts.
 - Dr. Krishnan asked if there is a conflict of interest in providing services and soliciting donations; Mr. Speidel clarified that *quid pro quo* solicitations would be unethical but approaching former clients for donations to help student and future clients would not likely present a conflict.
 - Dr. Creely said she would ask the C&I Directors to help her prepare a summary of the centers and institutes' work for Mr. Speidel.
 - Mr. Speidel said that stories about people who were helped by the center would work well in soliciting donations.
 - Mr. Moreau asked if each center should have its own Foundation account.
 - Mr. Speidel said the accounts should be active. If a center has a need and a use for donations, they should consider setting up a Foundation account.
 - The schedule for C&I Director meetings during fall semester 2012 will be sent via e-mail this summer.

Respectfully submitted,
Jean Serio



beyond expectations

Development Program

Centers & Institutes Directors

May 4, 2012

Bill Speidel, CFRE



Indiana University of Pennsylvania

Fundraising at IUP

- Foundation for IUP
 - 501 c 3
 - Incorporated in 1967
 - Independent Board of Directors
 - Various staffing models
 - Executive Director
 - VP/Executive Director
 - Adverse Interest

Fundraising Model

- University Relations Division
 - Alumni Relations
 - Development/Fundraising
 - VP serves as Liaison to FIUP
- FIUP
 - Owns and financially manages Residential Revival
 - Repository for Private Gifts

Foundation for IUP

- Staff of 5 full-time, 1 part-time
- Financial management of private gifts
 - Endowment
 - Designated Accounts
 - Scholarships
- Real Estate
 - Fairman Center

Development Program

- Annual Giving
 - Mass appeals
 - Annual gifts
- Major Gifts
 - Development Officers assigned to Colleges
 - Individual donors \$25,000 and above

Development Program

- Pittsburgh Regional Office
 - Corporate & Foundation Relations
 - Advancement
- Prospect Research
- Advancement Services
- Donor Relations
- *Planned Giving*

Private Gifts

2010-11 Fiscal Year

- Total pledges generated \$4,359,650
 - -1.67 % compared to FY 2010
- Cash received \$5,151,766
 - - 26.35% compared to FY 2010
- Three year average \$5,200,000

FIUP and the Research Institute

- Sources
 - Individuals, Corporations, Foundations, Government
- Gifts, Contracts, Grants
- Performance Funding

Alumni Gifts

- Total gifts \$2,394,900
 - 6.33% increase over FY 2010

- Total number of gifts 7,476
 - .90% increase over FY 2010

- Average alumni gift \$ 320

Annual Giving

- Total gifts and pledges \$1,098,154
- Total number 8,934
- Average annual gift \$ 123

Major Gifts (\$ 5,000 +)

- Total gifts and pledges \$2,896,109
- Number of gifts and pledges 89
- Average \$32,541

Scholarships

- Cannot be funded through university funds
- Private gifts:
 - Endowments producing annual income
 - Annual gifts restricted to scholarships
 - Annual gifts directly to scholarships
- Other sources

Scholarships

- FIUP Scholarship support **\$1,579,000**
 - Endowment \$30 million
 - Annual income \$903,000
- Annual gift income
 - \$196,500 unrestricted
 - \$479,500 restricted
- Academic Achievement Scholarship

Developing a Fundraising Plan Spring 2012

- Development Audit-Marts & Lundy
 - Development
 - Alumni Program
 - Communications & Marketing
 - University Events

Development Audit

- Findings and Recommendations
- Prepare for Dr. Driscoll's arrival
- Evaluate preparedness for major campaign

Audit recommendations

- Plan to introduce president
- Stabilize leadership
- 2-3 Funding priorities
- Improve data processes
- Measureable program and individual goals
- Consistent, comprehensive inclusive plan

Conclusion

- Tremendous potential
- University priorities
- Importance of employee investment
- Working together to raise revenue

- Questions and comments...