



Parents & Family Association

The University of Arizona Parents & Family Association Advisory Board Meeting

Joel and Katherine Lewis, Chairpersons
Friday, February 24, 9:00 am – 1:00 pm
El Portal Saguaro Room

In attendance: Mickey Green, David Bidwell, Chris Kopach, Diane Farrell, Teri Naftalin, Howie Naftalin, Andrew Comrie, Lee Comrie, Bonnie Klahr, Mark Barton, Denise Ciccio, Sandy Vasseur, Katherine Lewis, Joel Lewis, Matt Noble

On call: Natalie Morrison

Staff: *Kathy Adams Riester, Annamarie Tellez, Eric Davidson, Rachel Rivera*

8:30 am **Coffee & Socialize**

9:00 am **Welcome and Introductions Joel & Katherine Lewis**

- Approval of Denise Ciccio as Honorary Board Member Status

Motion: Mickey Green

Second: Sandy Vasseur

- Approval of October Minutes

Motion: Bonnie

Second: Dave Bidwell

9:15 am **Annual Giving Update: Krista Voth, Director of Annual Giving**

Student callers do primary annual giving with Parents. TOP is down across the board this year and that is related to new calling strategies. 80% of first time givers were being lost, so this year a strategy has been implemented to only ask for the amount given last year. The intent is to maintain loyalty of donor base, so in the long term this should pay off. Ask amounts have also changed based on age and college. Mailing strategies have been changed to allow for mail delivery first. Freshman parents were solicited in December as well instead of November. Second asks began last week for people who gave in the fall. The TOP is still no longer charging, so the bottom line remains largely unchanged. Wealth screening has been implemented to identify giving levels of prospective donors. Development officers do use Linked In as a piece for research. Annual giving can only use what is in the database. Freshman parents are always the most receptive to giving. Out of state freshman parents outperformed, but Arizona parents are getting closer. Out of state pays 49% versus 28% with credit card and gives larger amounts. Asks are framed to ask parents what the UA can do for them and is pitched as a partnership to develop goodwill and deliver positive messaging. The TOP is always interested in feedback about callers and calls. The staff of the call center is much more diverse than in years past, which brings fresh perspectives to the TOP. Creating connectivity with new donor base is critical. Providing funds to help students get counseling they could not normally afford is a goal of the annual giving campaign and of the 2017 senior class gift. The campus pantry could be a future priority as well. Unfortunately fulfillment is down this year, so now pledges must be confirmed by a

supervisor. Monthly reminder calls, mail, and e-mail are also sent to follow up with non-paid pledges. The TOP is almost done with freshman calling. Since January, \$23,000 have been pledged by parents. A gift summary report is given for tax information (not an official tax letter) but also has information on previous year's gift and encourages giving this year. Giving is encouraged to whatever the donor is passionate about. The bottom line still looks really good, especially minus \$84,000 in expenses. Average pledge is down due to a change in ask amounts. The student callers are complemented frequently by parent callers to the PFA.

10:00 am

Development & Recruitment Update: Dr. Kasey Urquidez, Vice President, Enrollment Management & Student Affairs Advancement and Dean, Undergraduate Admissions

The launch pad fundraising initiative has enjoyed great support and is moving forward. This used to be called the student success district but received feedback and changed. The initiative analyzed the needs of today's students. Embracing the new generation of students and new models of student learning is critical to this project. Providing new spaces to fill these needs is a goal. The renderings of the designs are shown and demonstrated. The science and engineering library will be revitalized to increase collaboration and functional use of space. Outdoor spaces will also have increased places for students to gather and enjoy the outdoors. The main library will feature increased flexible student spaces. Expanded technologies will be offered. Bear Down Gym will be converted back into its original use as a gymnasium and will feature an additional building on the south side to expanded success services. 100% Engagement is moving along well and will be helped by this project. This will be open in two years with phases. The project cost may be close \$70 million. Funding will be a multi-prong approach, but donors may contribute \$20 million or more. Fees, bonds, and institutional funds will contribute as well. The Think Tank will benefit from this project, connecting it to the PFA.

An enrollment and recruitment update and review of ABOR 2025 goals were given. Clarification on graduation rates and online enrollment were given. Online is developing well and is providing opportunities for people close to their degrees to finish. It is also increasing access to college for students who are less able to come to the brick and mortar campus. Online and distance learning is all under the same enrollment management systems as in person. Freshman class is looking strong in numbers, diversity, and academic strength for the fall. The coalition application is beginning, as well as self-reported grades. Application numbers are down but all other metrics are up. The New Student Experiences Task Force is attempting to address critical issues in recruiting and retaining students.

10:30 am

Committee Reports

Co-Chair Report: Joel & Katherine Lewis

Family Weekend was a good event and John and Sandy won Volunteer of the Year. Feedback from parents and families come in that is very positive about the PFA Board. It makes a big difference in the level of comfort and security for them.

Legislative Affairs Liaison: Bonnie Klahr

UA Parents Day at the Capitol was on February 7 and saw a number of parents join. It was a smaller group this year but the second-year experience helped with expectations.

The group met with Sean Bowie, Sylvia Allen, and Becky Nutt in the morning. Lunch was taken with Daniel Hernandez and Todd Clodfelter (who are both pro-education). Lela Alston introduced the group on the floor of the House of Representatives. All these

representatives are in favor of 50/50, but how to pay for it is the difficulty. Right now we are supporting the governor's budget of 34%, but would ideally like to see an increase in funding to higher education and the UA. The universities would be able to achieve better healthcare if they were able to negotiate institutionally. University employees are in good health and are supplementing other state agencies, so the legislature is not in favor of independence. All are welcome to join next year and the day is enjoyable and makes a difference. The day this year was productive and many legislators were willing to speak to PFA representatives. The best thing most think we can do is support the governor's budget.

Campaign Committee: Natalie Morrison

None

Student Recruitment & Retention Committee: Teri & Howie Naftalin, Denise Ciccio

Coffee chats just took place this past weekend. The date of the coffee chats is problematic for Southern California and East Coast residents. Wildcat Days are coming up, and Reginald reached out to the PFA board members. Respond and attend these events, because it helps parents get a feel for the culture of the UA. In the future, different days will be examined for Coffee Chats. The PFA staff will e-mail Wildcat Days dates to the PFA board.

Oracle Board Liaison: Matt Noble

A partnership with career services has established three Greek ambassadors to create connections between the Greek community and employers. There is a significant housing shortage for Greek students now and this will have an institutional impact. Housing shortage could have a negative impact on Greek involvement in volunteerism and community service. Hazing is at a high rate in recent history and can involve extreme negative situations. Volunteers would like to meet key staff on campus in order to create and maintain a better relationship with the overall institution. Technology can create difficulty for volunteers that causes fatigue. Generational differences are also critical to understand to prevent a loss of volunteer bases. Sanction processes are now more complex. As Greek numbers increase, housing, volunteerism, and funding should also increase. Fraternity and Sorority programs is independently funded. Students who are Greek retain at higher rates, volunteer more, and Greek alumni donate more. There are currently 12 women's houses and 10 or 11 men's houses on campus. There are many unhoused organizations and some whose houses are not long-term solutions. Houses generally speaking hold 50 to 60 people. There is movement in the SAEM/AISS division to create better housing opportunities for Greek chapters and students. New builds could also improve behavior.

SALT Liaisons: Sandy and John Vasseur

SALT is piloting a new service based on the Autism spectrum called Social Transitions which individualizes the college experience and costs \$4,100 per semester. 71% of freshmen in SALT earned a 2.0 gpa or higher, 42% of all students earned a 3.0 gpa or higher. SALT has moved back into the new building. Survey feedback was an average of 4.62 out of 5 stars.

11:15 am

Marketing Feedback: Kathy Adams Riester

Website

We will be able to add photos once the website becomes brand compliant. Once the website becomes brand compliant, add a carousel item to make a donation. There should be an easier way to solicit donations on the website. The join or sign in link could be reframed to allow for immediate donations. Currently it is on the bottom of the

website. There is no general need to go to the website if the parent or family members already follows the social media website. Link to upcoming events in a more comprehensive way. Many may not know the difference between PFP and the PFA. We need to prioritize our website space. Put together a list of services that the PFA prioritizes and have it become a greater presence on the website. What do parents want to know more often than once a year? Do not mention the lack of registrations and pull event messaging from the website in a more immediate way. Center the contact information on the page to make it more visible. It would be beneficial to be able to search for an FAQ. The family handbook will provide a comprehensive resource for parents and family members. Add links to Bursar, meal plans, and other compensatory websites. Tell a better story about the PFA on the home page. A better calendar function that is more mobile friendly would be good. Send the PFA other examples of websites that you think are well organized and functional. When surveys are created, send them as standalones as opposed to including them in other e-mails.

E-News Letter

None

Social Media

Increase in followers on social media. Numbers in the PFA database have nearly doubled. The E-Newsletter is providing great and important communications to parents. The PFA board members will receive analytics on mail campaigns. Use platforms in order to create interest in prospective donors.

11:45 am

Break/Lunch Set Up

12:00 pm

Working Lunch & Director Updates: Kathy Adams Riester

The PFA Board is looking to fill 5-6 board positions including the Oracle Board Chair, Campaign Chairs, PFA Board Chairs, and SALT Chairs. The Think Tank Funding Proposal for the coming year was presented to the Board.

Budget Overview

Annualized budget from FY 2015-2016 and current budget for FY 2016-2017 presented. BC Harley scholarship is not on budgets because we only award it. Parent TOP funding is present, as well as foundation accounts for events. Member donations are online donations. Leadership circle is present in this account. Online donations have decreased by close to \$20,000 due to offering free membership. In the long run we hope to bring this level back up. To meet our bottom line we need about \$50,000 and this will most likely be achieved. The PFA will be seeking renewed sponsorship from the Marshall Foundation and the Marriott. We are hoping to capture more donations at Orientation. The absence of the golf tournament is due to increased responsibility in Family Weekend. Development with parents is focused on TOP and membership. The PFA has the backing of divisional VIPs and the decision to create inclusive membership is paramount to furthering the retention and recruitment missions of the UA. Parents and families are guided to donate to where their interests are, and reaching out to more areas may be better for the institution despite a drop in PFA giving. Build more newsletter messaging and other content areas to grab donors. Collective impact and membership need to increase. Family Weekend can even be a significant place to recruit donors and solicit Donations. The leadership circle is a minimum gift of \$1,000 per year. We are also interested in creating a circle for those who donate elsewhere on campus. The financial objective is to have some rollover but primarily to grant money

back and do fundraising for the UA. Parents and families will generally be asked to donate every 60 days or so, and only from the PFA unless the prospect is an alumni. How PFAs across the country create and come about funding depends upon the institution. Connectivity is the most important component.

Coffee Chat Check In

Coffee Chat attendances and successes presented. Arlington VA and MN had the high attendance at 15. Diane attended the Scottsdale CC and Denise Ciccio attended New York. Future dates will consider school holidays. Reach out to high school counselors to promote the events. College decision dates in various states, and weather, are also considerations.

Membership & Social Media Numbers

Family Weekend Feedback

Opportunities to help: Decision Days, Summer Send Offs

May Board Call Date – Tuesday, May 9 – 9am – 10:30 am

Feel free to join if you are in Tucson.

Recruiting New Members

Make sure we are maintaining a diverse board in demographics and interests. Feel free to send Kathy information about potential board members.

12:45 pm **Announcements & Wrap Up**

1:00 pm **Adjourn**

Motion: Joel Lewis

Second: Diane Farrell

Spring 2017 Date Reminders

April 9	Chicago Out of State Orientation
April 23	Seattle Out of State Orientation
April 28	NYC Parent, Alumni & Friends Event at Macy's Herald Square
April 30	New York City Out of State Orientation
July 16	Denver Out of State Orientation
July	Summer Send Offs TBD

Fall 2017 Date Reminders

August 18	Wildcat Family Conference
	Proud Parent Social
August 19	Bon Voyage Brunch
October 13 – 15	Family Weekend

