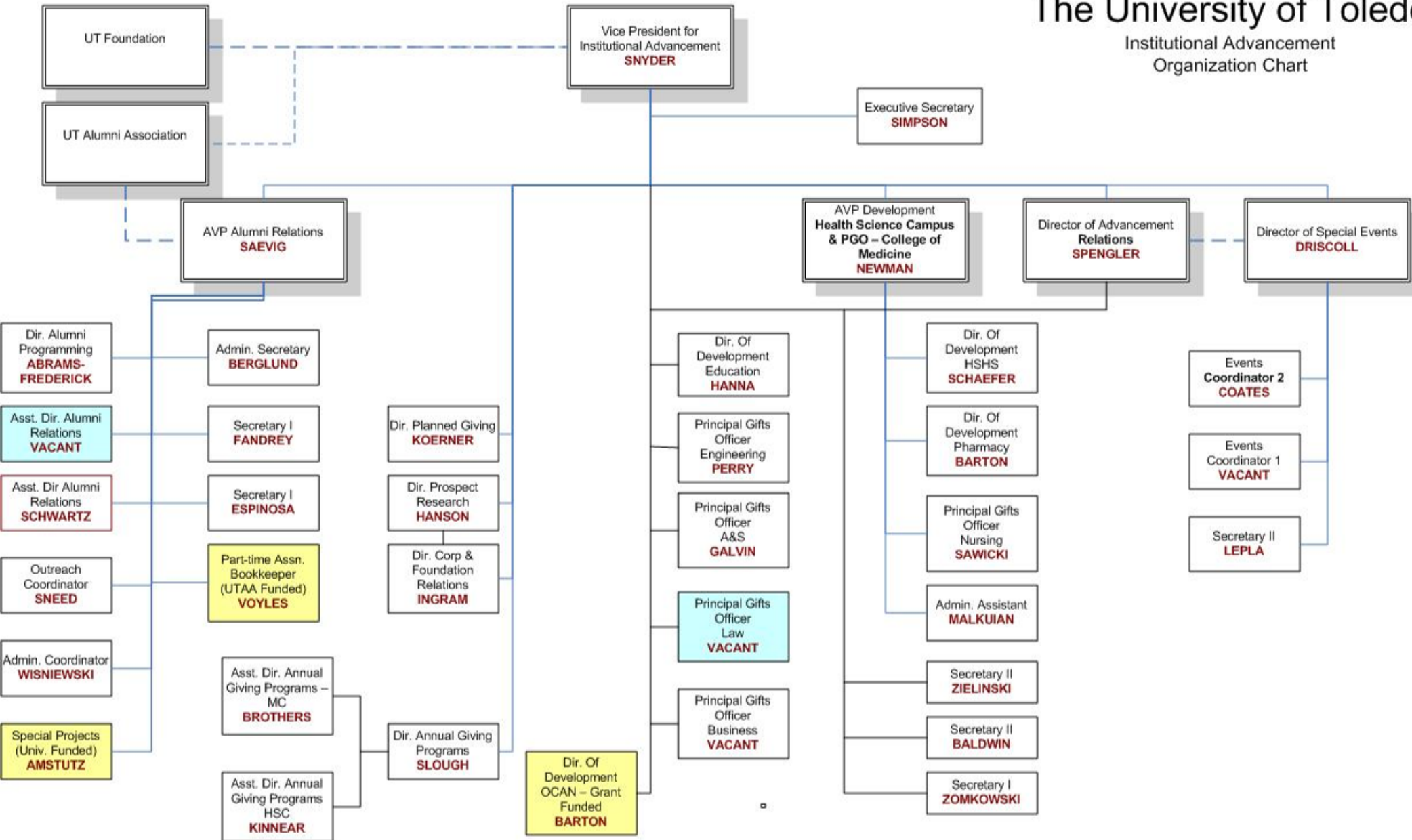


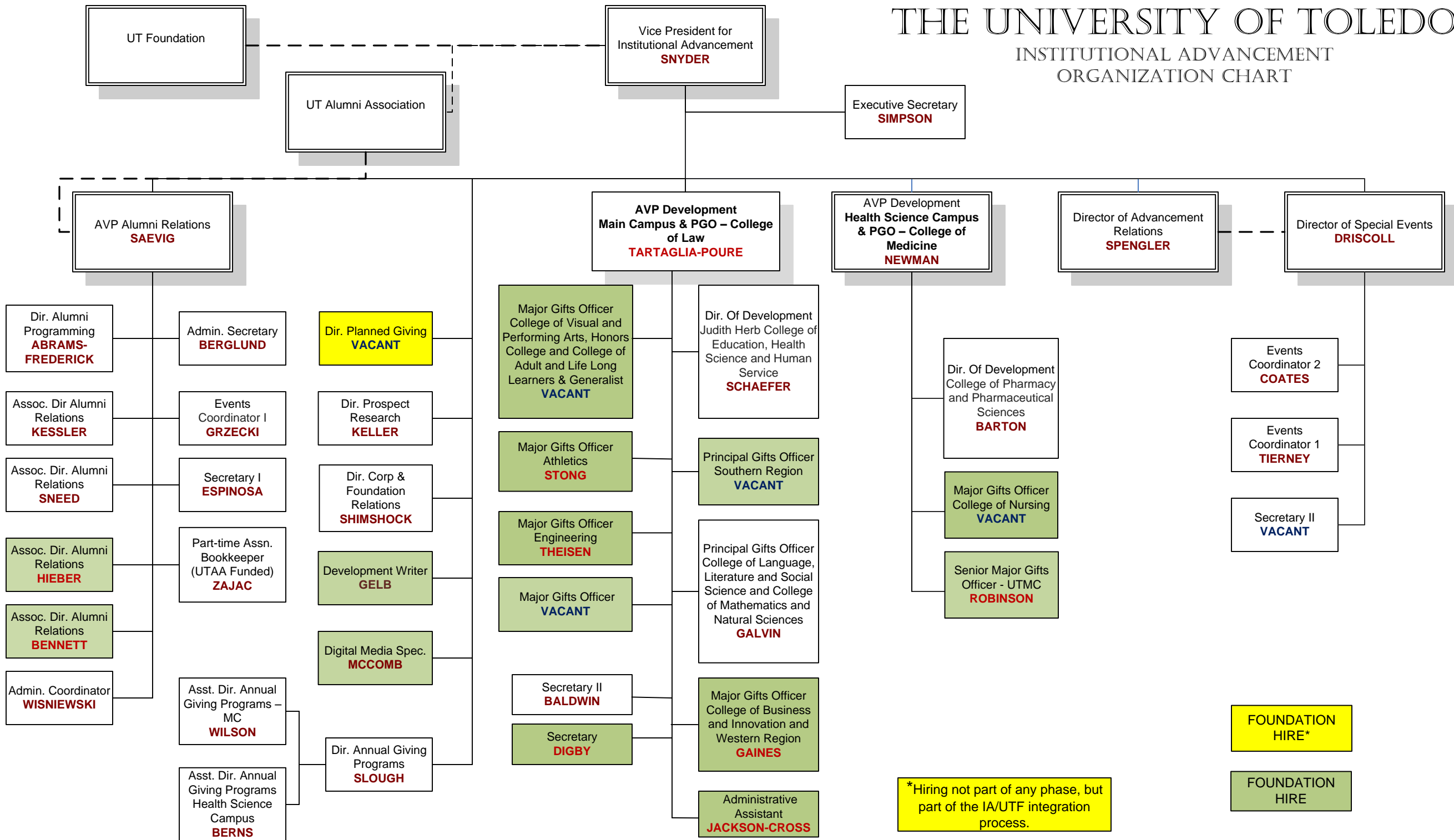
The University of Toledo

Institutional Advancement Organization Chart



THE UNIVERSITY OF TOLEDO

INSTITUTIONAL ADVANCEMENT ORGANIZATION CHART



*Hiring not part of any phase, but part of the IA/UTF integration process.

REENGINEERING a College/Dept.

1. What does your college/department deliver? Outputs?

Significant sums of contributed dollars. On average \$20 million annually.

2. Are they measurable? And how are they measured?

Yes. By college, by fundraiser, cost per dollar raised.

3. Is your area meeting those metrics or expectations?

Yes

4. If not, what could you change to be able to meet those metrics?

5. In an ideal world what would your organization look like?

More fundraisers with national portfolios.

6. Fill in your current staff into that ideal organization. Leave off those who do not fit into your ideal organization and add those positions that are needed.

Four or five added. None to subtract.

7. What current tasks/processes would you eliminate and or change to achieve this ideal organization and desired outputs?

Over the last decade through budget reductions and staffing reductions the Advancement operation has been pared down to only those activities that support donor relations, stewardship and alumni relations. As important, we

continue to implement major events such as Homecoming and Art on the Mall using existing staff.

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The conversion process has and continues to involve a reevaluation and restructuring of these converted positions as necessary. This process of position by position review will continue.

The information below addresses the remaining positions within the University of Toledo Institutional Advancement Division.

QUESTIONS TO BE ANSWERED BY VP OF THE REQUESTING DEPT (Ideally these should be answered and included with the EPAF and sent on to the RCG team)

POSITION: Associate Vice President (3)

1. Why does this work need to be done at all?
The Associate Vice President position performs three critical functions. The AVP manages a portfolio of high potential prospective donors. As important, the AVP provides management for the fundraisers on their respective campuses. In alumni Relations, the AVP manages the UT Alumni Association Board, 35 Chapters nation-wide and 20 Affiliate organizations as well as all Alumni Relations staff.
2. Can it be absorbed by someone in your department?
With the increase in the number of colleges and schools and the experience and expertise needed to successfully balance the portfolio and the management oversight three AVP positions are the minimum necessary.
3. Is there another UT employee (either campus) that can absorb this work?
No

4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
This work requires years of experience and expertise in donor relations, understanding of both management principles and IRS tax Guidelines, Alumni Relations and the ability to cultivate and close significant six and seven-figure gifts.
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
No
6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.
See attached org chart and MOU
7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?
Not without significant training and experience

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QUESTIONS TO BE ANSWERED BY VP OF THE REQUESTING DEPT (Ideally these should be answered and included with the EPAF and sent on to the RCG team)

POSITION: Director Advancement Relations

1. Why does this work need to be done at all?
Advancement Relations has primary responsibility for donor stewardship of over 10,000 donors, serves as coordinator and support for Women in Philanthropy, the premier women's philanthropic group in NW Ohio providing significant grants to campus activities.
2. Can it be absorbed by someone in your department?
This is a one person operation and could use support
3. Is there another UT employee (either campus) that can absorb this work?
Perhaps, but why?

4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
A student could serve to assist the current position holder. However, given the high level donors it serves, it would be problematic.
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.

See above and org chart attached.
7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?
Not at this time.

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POSITION: Administrative Coordinator Alumni Relations⁰

1. Why does this work need to be done at all?
This position has primary responsibility for coordination of College of Medicine alumni events including continuing education programs, local, regional and national COM alumni events, Match Day and Medical Mission Hall of Fame
2. Can it be absorbed by someone in your department?
No
3. Is there another UT employee (either campus) that can absorb this work?
Possibly, but why?
4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.

6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.

See Org chart

7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?

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POSITION: Director of Alumni Programming

1. Why does this work need to be done at all?
The position has primary responsibility for coordination Homecoming, Art on the Mall, Bowl Game alumni activities and the annual alumni membership campaign.
2. Can it be absorbed by someone in your department?
The events outlined above require the efforts of all staff.
3. Is there another UT employee (either campus) that can absorb this work?
How would that be accomplished?
4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
Student workers are already involved.
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.

6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.

See attached org chart

7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?

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POSITION: Director Special Events

1. Why does this work need to be done at all?
The University and in particular the President's Office hosts dignitaries, major donors, and significant visitors to campus. Each of these visits have events planned to welcome or recognize our guests. Due to the need for protocol and hospitality expertise the special events position provides that expertise.
2. Can it be absorbed by someone in your department?
Event planning is time intensive and would take away from fundraising
3. Is there another UT employee (either campus) that can absorb this work?
Possibly, but why?
4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
We use student ambassadors

5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.
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7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?

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POSITION: Director Prospect Research

1. Why does this work need to be done at all?
Prospect Research is critical to determining ability and affinity to give as well as particular areas of personal interest of prospective donors. The information guides travel and contact, adds to efficiency and provides strategic guidance to the president.
2. Can it be absorbed by someone in your department?
Research requires significant amounts of time which would take away from fundraising activities.
3. Is there another UT employee (either campus) that can absorb this work?
4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.

6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.

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7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?

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POSITION: Director Corporate and Foundation Relations

1. Why does this work need to be done at all?
Gifts from corporations and foundations comprise some 15% of annual gift income
2. Can it be absorbed by someone in your department?
The position works in tandem with grants and sponsored programs in identifying and acquiring grants for faculty research projects.
3. Is there another UT employee (either campus) that can absorb this work?
GSP
4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
Possible

5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
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POSITION: Executive Secretary II

1. Why does this work need to be done at all?
Executive Secretary manages all administrative aspects of the Institutional Advancement Division including budget manager, HR matters, support to VPIA, Travel arrangements for VP and President, Prepares gift agreements. Coordinates activities of other support personnel.
2. Can it be absorbed by someone in your department?
No. Other support staff are CWA and are not permitted to work with confidential materials.
3. Is there another UT employee (either campus) that can absorb this work?

No

4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
In addition to highly skilled nature of the work, the need for confidentiality requires a highly skilled professional.
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
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POSITION: Director Annual Giving

1. Why does this work need to be done at all?
Director of Annual Giving has primary responsibility for telemarketing, direct mail and solicitation of leadership annual gifts. Also supervises campus specific assistant annual fund positions and telemarketing student callers.
2. Can it be absorbed by someone in your department?
The annual fund activities take place weekdays, weekends and evenings.
3. Is there another UT employee (either campus) that can absorb this work?
No one with necessary skill and expertise.

4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
Students serve as paid callers in the telemarketing area.

5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
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Advancement Relations has primary responsibility for donor stewardship of over 10,000 donors, serves as coordinator and support for Women in Philanthropy, the premier women's philanthropic group in NW Ohio providing significant grants to campus activities.
2. Can it be absorbed by someone in your department?
This is a one person operation and could use support
3. Is there another UT employee (either campus) that can absorb this work?
Perhaps, but why?

4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
A student could serve to assist the current position holder. However, given the high level donors it serves, it would be problematic.
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
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POSITION: Associate Vice President (3)

1. Why does this work need to be done at all?
The Associate Vice President position performs three critical functions. The AVP manages a portfolio of high potential prospective donors. As important, the AVP provides management for the fundraisers on their respective campuses. In alumni Relations, the AVP manages the UT Alumni Association Board, 35 Chapters nation-wide and 20 Affiliate organizations as well as all Alumni Relations staff.
2. Can it be absorbed by someone in your department?
With the increase in the number of colleges and schools and the experience and expertise needed to successfully balance the portfolio and the management oversight three AVP positions are the minimum necessary.
3. Is there another UT employee (either campus) that can absorb this work?
No

4. Can any of the work be supplemented with a student, thus providing experiential learning? or part-time employee or combination of both?
This work requires years of experience and expertise in donor relations, understanding of both management principles and IRS tax Guidelines, Alumni Relations and the ability to cultivate and close significant six and seven-figure gifts.
5. How will this work be done if approval cannot be granted and by whom? Please provide titles and names, if known.
No
6. Has a reengineering of the functional area been completed? If so, please provide the details of the changes made and a current organization chart. Also, provide prior year's org chart.
See attached org chart and MOU
7. Is there another UT employee (either campus) who is qualified to perform these duties/responsibilities, even if it would require a job change for them?
Not without significant training and experience