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Respondent

163

Amy Hall

02:08

Time to complete

1. Please select your UC Committee *

- ☐ Awards Special Committee
- ☐ Budget and Finance
- ☐ Communication
- ☐ Information Technology
- ☒ Institutional Advancement
- ☐ Physical Environment
- ☐ Campus Wellness
- ☐ Student Engagement and Success
- ☐ Talent Development and Human Resources
- ☐ ad hoc Social Engagement

2. Did the Committee meet this month? If you met, select Yes and complete the rest of the survey. Provide minutes in question 7. You do not need to upload documents unless they are supporting materials for this month's meeting.

If you did not meet, select No, give reason for the cancellation in question 7 and submit the survey. You do not need to complete the rest of the survey or upload any documents. Thank you for logging this month's meeting status. *

- ☒ Yes
- ☐ No

3. Date of Meeting

12/8/2023



4. Committee Members in Attendance or Absent With Notice

Committee Members In Absentia with notification:

Alia Baig Kim Cole, Administrator (NYC)

Alexis Currie Grace DeWitt (internship)

Marc Haas Dean Emily Janoski-Haehlen, Vice Chair (NYC)

Marjorie Hartleben Joe Shannon (ASO rehearsal)

John Huss, Chair

Matt Kolodziej

Benjamin Michael

Mary Rossett, Secretary

Chris Stimler

University Personnel

Amy Hall

Kim Zebedis

5. Committee Members Absent Without Notice

Michele Novachek

6. Based on your goals for the year, outline what decision were made or action items discussed during this month's meeting that moved goal(s) forward

Presentation:

Center for Gift & Estate Planning at The University of Akron

Presented by Kim Zebedis, Executive Director

7. Provide Meeting Minutes/Monthly Report or reason for meeting cancellation here (do not attach minutes as a document in #8 below).

John Huss called the meeting of University Council's Institutional Advancement Committee (IAC) of The University of Akron to order at 9:00am. Mr. Huss sought a motion to approve the Minutes from the October 13, 2023, meeting. A motion was made and seconded and passed unanimously.

John Huss introduced Kim Zebedis, Exec Director, Center for Gift & Estate Planning. Mrs. Zebedis presented "Leaving a Legacy: Planned Giving at UA." She explained what the G&EP program looks like, what the goals are, and how support is generated. As a subset of fundraising, planned giving focuses on present arrangements for future gifts. She differentiated between various funding opportunities for the coming year such as Great Wealth Transfers, Secure Act 2.0 QED, Charitable Gift Annuities, and Donor-Advised Funds, a new initiative through a partnership with Akron Community Foundation. Donor gifts, one of the more significant donations non-profits receive, helps sustain the future of UA.

G&EP work includes building and maintaining relationships with donors and serving as support through the process of creating a planned gift. This is generally done through a variety of efforts which include marketing, education, cultivations, gift support, administration of the gifts, and stewardship which is born out of the 1870 Society programming such as "Lunch and Learns".

Matt Kolodziej asked for elaboration on what motivates donors to give to ground level funding that may benefit UA with student retention and recruitment. Mrs. Zebedis commented, many donors specify where they want their legacy to go while others give unrestricted gifts, allowing UA to assign it to areas of greatest need. By departmental chairs communicating their departmental priorities to G&EP and the Department of Development, these needs can be highlighted to donors in hopes of securing funding for these specified areas. Mr. Kolodziej expressed the importance of sharing challenges - not just the greatest hits - to align real needs with the conversations being had. Mrs. Zebedis acknowledged that donors want to be aware and want to leave a meaningful legacy that impacts students. Mr. Huss concluded that this type of follow-up among faculty, chairs, and directors, knowing of a need that cannot come from a general fund, should be encouraging to communicate to DOs and G&EP in order that maximum benefit can be realized for UA.

Mr. Huss also asked a question about reporting from an accounting standpoint and how dollar amounts are projected for planned gifts. Mrs. Zebedis agreed that approximates are sometimes all we have as it may be several years before values are realized. However, when specific values are given then those can be reported for campaign purposes. At the completion of Mrs. Zebedis' presentation, Mr. Huss asked if there was any other old business to discuss. Hearing none, the committee moved on to new business.

Mr. Huss encouraged committee members to communicate what they are learning through IAC to the constituencies they represent. As the next semester rolls around, he will be working to ensure there is proper representation across IAC mentioning that two current committee members assigned to represent Faculty Senate, are not actually on Faculty Senate. Mr. Huss acknowledged the importance of good representation to align future anticipated needs in a harmonious way to help the university continuously function better.

Discussion wrapped up, and Mr. Huss asked if there was any additional business to discuss. With none raised, Mr. Huss asked for a motion to adjourn. A motion was made, seconded, and passed unanimously. Meeting adjourned at 9:39 am.

Next meeting is Friday, January 12, 2024, at 9:00am.

8. If you have a document that provides supporting materials for this month's work, upload here. This attachment should not be the monthly minutes (minutes should be submitted in #7 above).
(Non-anonymous question)



[IAC Agenda 12.8.2023 Amy Hall.pdf](#)

9. Are there any new topic submissions or other information/feedback you would like to share from the committee?

n/a