University of Pittsburgh | Activity Area Plan
Philanthropic & Alumni Engagement

I. Overview

1. **Name of Activity Area:** Philanthropic & Alumni Engagement
2. **Name of Activity Area Lead:** Kris Davitt, Senior Vice Chancellor for Philanthropic & Alumni Engagement
3. **Name of Individual Submitting Activity Area Plan:** Nancy Merritt, Vice Chancellor for Alumni Relations
4. **Date of Submission:** August 5, 2020
5. **Revision of a Previously Approved Activity Area Plan?** No
6. **Plan Summary:**

- This plan balances the key functions of the Division of Philanthropic & Alumni Engagement (PAE) with the health and safety of the Pitt community and our key constituents.
- We understand that de-densifying campus is a major step in mitigating the spread of COVID-19. Our stance, therefore, is to limit the number of PAE staff members working from campus, and to limit PAE activities on campus for the duration of this pandemic.
- We recognize that in-person interactions through meetings or events can be important in advancing relationships with alumni, students and prospects. The health and safety of our staff and constituents is of the highest importance, however, and these activities should only occur if 1.) all participants adhere to University standards and guidelines and 2.) all participants are fully comfortable with conducting in-person interactions.
- Staff members must complete a COVID-19 Symptom Attestation Form 24 hours in advance of an in-person meeting, visit or event.
- Meetings, visits and events may require University-related Travel. As stated in the University's Standards and Guidelines on Safe Mobility, travel for the duration of the pandemic must be approved (see below chart for a summary of Approval Authority). All travel bookings must be made through Concur. Longstanding Pitt policy discourages staff using their own vehicles. Given that regional travel is a key business activity for many frontline fundraisers and alumni staff, and that health protocols indicate the use of one's own vehicle is the safest option, the SVC for PAE will grant exemptions to this policy for the duration of the pandemic or until the Resilience Framework health protocols are changed. Staff members must comply with current University policy for individual vehicle use; specifically, they must carry insurance information issued by the University. Additionally, staff members who travel outside of the local region and adjacent counties should quarantine for some period of time not to exceed fourteen (14) days prior to returning to their Home Campus

in order to monitor their health for COVID-like symptoms. Additional information is available in the Safe Mobility Standards and Guidelines.

The following chart is provided to indicate who has approval authority for various PAE functions within each risk posture.

Approval Authority

	High Risk Posture	Elevated Risk Posture	Guarded Risk Posture
One-time Office Access	SVC	VC	VC
Meetings/Visits (On-campus)	SVC	SVC	SVC
Meetings/Visits (Off-campus)	SVC	SVC or VC	SVC or VC
Events (On-campus)	n/a	SVC	SVC
Events (Off-campus)	SVC	SVC	SVC
University-related Travel	SVC	SVC or VC	SVC or VC
Alum/Volunteer/ Affiliate Activity	SVC	VC	VC

7. As the lead of this activity area, I hereby confirm that PAE will commit to following the University's Healthcare Standards and Guidelines and Personnel Standards and Guidelines. In particular, while on campus, PAE employees will:

    a. Wear face coverings in the presence of any other individual, and in full accordance with the University's Standards and Guidelines on PPE, Face Coverings and Hygiene
    b. Adhere to all physical distancing, safety, and hygiene signage
    c. Use physical barriers or maintain six feet of physical distance while engaging with others
    d. Clean their personal and office spaces at the beginning of work period

II. Functions in Each Operational Posture

The following PAE functions (1-5) are conducted in the same manner under all three operational postures.

a. Function 1
    i. What: Collect, review, scan and distribute mail and packages being sent to PAE offices or individual staff members

ii. How: All PAE mail is being sent to the PAE offices located at Park Plaza. A designated staff member will open, review, scan and send an electronic copy to the addressee. Should there be additional steps required, the designated staff member will contact the appropriate colleague(s).
iii. Number of people/positions required on campus: 2, staggered schedule
iv. Buildings: Park Plaza

b. Function 2
i. What: Gift processing (physical checks)
ii. How: Checks that are sent via mail to a PAE address will be forwarded to the appropriate staff member for processing. PAE is also working to establish a lockbox service for physical checks to be processed.
iii. Number of people/positions required on campus: 2-3 at one time, staggered schedule for a total of 9 during the course of each week.
iv. Buildings: Park Plaza

c. Function 3
i. What: Provide IT support to PAE staff members
ii. How: A designated PAE staff member will provide support to colleagues remotely whenever possible, however, there are instances when they will need to provide support in person.
iii. Number of people/positions required on campus: 1 at a time with a total of 3 individuals who rotate duties based on building location.
iv. Buildings: Office in Park Plaza, but may need to access Alumni Hall, Webster Hall, the Medical Arts Building, or Forbes Tower.

d. Function 4
i. What: Conduct regular walk-throughs for facilities maintenance purposes
ii. How: Designated PAE staff members will develop a schedule to regularly check PAE office space for any maintenance issues that may need to be addressed.
iii. Number of people/positions required on campus: 2, staggered schedule
iv. Buildings: Park Plaza, Webster Hall, the Medical Arts Building, Forbes Tower, Alumni Hall

e. Function 5
i. What: All other Business Operations *not required* to be in office
ii. How: Employees other than the ones identified in Functions 1-4 should not come to the office. All PAE staff members have been set up to conduct work remotely. General office phones have been forwarded where appropriate. Staff may coordinate ordering supplies as needed. There may be instances when individual staff members need to return to the office to pick up supplies, obtain IT support, or for other essential reasons. There is an approval process in place for staff members to request access to their office.
iii. Number of people/positions required on campus: Upon request for reasons deemed essential to an employee's work.

iv. Buildings: Park Plaza, Webster Hall, the Medical Arts Building, Forbes Tower, Alumni Hall

The remaining PAE functions vary in the manner in which they are conducted across the three operational postures, as detailed below.

1. **High Risk Posture**

a. Function 6
   i. What: Solicit gifts via Telefund
   ii. How: Callers will conduct their work fully remote.
   iii. Number of people/positions required on campus: 0
   iv. Buildings: N/A
b. Function 7
   i. What: Meetings/Visits – on campus
   ii. How: No meetings or visits will be conducted on campus.
   iii. Number of people/positions required on campus: 0
   iv. Buildings: N/A
c. Function 8
   i. What: Meetings/Visits – off campus
   ii. How: No meetings or visits will be conducted off campus.
   iii. Number of people/positions required on campus: 0
   iv. Buildings: N/A
d. Function 9
   i. What: Events – on campus
   ii. How: No events will be conducted on campus.
   iii. Number of people/positions required on campus: 0
   iv. Buildings: N/A
e. Function 10
   i. What: Events – off campus
   ii. How: If Pitt is in "High Risk Posture," it is presumed that this is due to local conditions. Therefore, no PAE events will be conducted in the greater Pittsburgh region. PAE events conducted in low-risk regions may occur, providing all staff and participants adhere to University standards and guidelines and local/regional mitigation steps. These events must be approved by the SVC for PAE. Should regional conditions change that would require greater restrictions, the event will be canceled, postponed, or adapted for a virtual experience. Per the University's Standards and Guidelines on Safe Mobility, University travel is not allowed under the High Risk posture unless an exception request is approved by the SVC for PAE.
   iii. Number of people/positions required on campus: 0
   iv. Buildings: N/A
f. Function 11
   i. What: Alumni/Volunteer/Affiliate Activity: The Pitt Alumni Association supports and manages volunteer groups who plan and

execute engagement opportunities on- and off-campus in order to advance Pitt's mission.

ii. How: No meetings or events will occur in-person in the greater Pittsburgh region. Events or meetings may occur in locations deemed low-risk, providing all staff and participants adhere to University standards and guidelines and local/regional mitigation steps. These events must be approved by the SVC for PAE. Should regional conditions change that would require greater restrictions, the event will be canceled, postponed, or adapted for a virtual experience.

iii. Number of people/positions required on campus: 0

iv. Buildings: N/A

g. Function 12

i. What: UPMC fundraising and engagement activity

ii. How: Staff will adhere to minimum health and safety requirements based on Pennsylvania's red phase, with additional guidance from UPMC.

iii. Number of people/positions required on campus: 0

iv. Buildings: N/A

2. Elevated Risk Posture

a. Function 6

i. What: Solicit gifts via Telefund

ii. How: This function will be accomplished with a hybrid model of a small number of Telefund staff working from the call center and others working remotely. All protocols for face coverings, hygiene, distancing and cleaning will be adhered to.

iii. Number of people/positions required on campus: Maximum of 14 during a shift (one call center manager and up to 13 callers).

iv. Buildings: Park Plaza

b. Function 7

i. What: Meetings/Visits – on campus

ii. How: In an effort to de-densify campus, no meetings or visits will be conducted on campus. However, exceptions may be made if the purpose of the meeting is to advance a gift conversation or a significant relationship and no alternative means of meeting are adequate. All participants must adhere to health and safety standards and guidelines. Exceptions to meetings or visits may be granted by the SVC for PAE, and arrangements should be made with the appropriate building manager(s).

iii. Number of people/positions required on campus: Smallest number possible; No more than 25.

iv. Buildings: Dependent on purpose of meeting.

c. Function 8

i. What: Meetings/Visits – off campus

ii. How: PAE staff members may conduct in-person meetings with individuals (no more than allowed by local limits) within a 5-hour driving radius of Pittsburgh. They must adhere to standards and guidelines related to face coverings, hygiene, distance and safe mobility.
iii. Number of people/positions required on campus: 0
iv. Buildings: N/A

d. Function 9
i. What: Events – on campus
ii. How: In an effort to de-densify campus, no PAE events will be conducted on campus. However, limited exceptions may be made if the purpose of the event significantly advances the mission of PAE and no alternative means of convening are adequate. All participants must adhere to health and safety standards and guidelines. Exceptions for events may be granted by the SVC for PAE, and arrangements should be made with the appropriate University entities.
iii. Number of people/positions required on campus: Smallest number possible; No more than 25.
iv. Buildings: Dependent on event.

e. Function 10
i. What: Events – off campus
ii. How: Off-campus events located within the greater Pittsburgh region may occur as long as all University standards and guidelines are followed, the purpose of the event advances the mission of PAE and no alternative means exist, and the event is capped at 25 attendees. PAE events conducted in low-risk regions may occur, providing all staff and participants adhere to University standards and guidelines and local/regional mitigation steps. All events must be approved by the Senior Vice Chancellor for Philanthropic & Alumni Engagement. Should regional conditions change that would require greater restrictions, the event will be canceled, postponed, or adapted for a virtual experience.
iii. Number of people/positions required on campus: 0
iv. Buildings: N/A

f. Function 11
i. What: Alumni/Volunteer/Affiliate Activity: The Pitt Alumni Association supports and manages volunteer groups who plan and execute engagement opportunities on- and off-campus in order to advance Pitt's mission.
ii. How: Meetings or events may occur in-person in the greater Pittsburgh region as long as all University standards and guidelines are followed, the purpose of the event advances the mission of PAA and no alternative means exist, and participation is capped at 25 attendees. Events or meetings may occur in locations deemed low-risk, providing all staff and participants adhere to University standards and guidelines and local/regional mitigation steps. Should regional conditions change

that would require greater restrictions, the event will be canceled, postponed, or adapted for a virtual experience.

iii. Number of people/positions required on campus: Smallest number possible; No more than 25.

iv. Buildings: Dependent on event.

g. Function 12

i. What: UPMC fundraising and engagement activity

ii. How: Staff will adhere to minimum health and safety requirements based on Pennsylvania's yellow phase, with additional guidance from UPMC.

iii. Number of people/positions required on campus: 0

iv. Buildings: N/A

3. Guarded Risk Posture

a. Function 6

i. What: Solicit gifts via Telefund

ii. How: This function will be accomplished with a hybrid model of a small number of Telefund staff working from the call center and others working remotely. All protocols for face coverings, hygiene, distancing and cleaning will be adhered to.

iii. Number of people/positions required on campus: Maximum of 14 during a shift (one call center manager and up to 13 callers).

iv. Buildings: Park Plaza

b. Function 7

i. What: Meetings/Visits – on campus

ii. How: In an effort to de-densify campus, no meetings or visits will be conducted on campus. However, exceptions may be made if the purpose of the meeting is to advance a gift conversation and no alternative means of meeting are adequate. All participants must adhere to health and safety standards and guidelines. Exceptions to meetings or visits may be granted by the SVC for PAE, and arrangements should be made with the appropriate building manager(s).

iii. Number of people/positions required on campus: Smallest number possible; No more than 250.

iv. Buildings: Dependent on purpose of meeting.

c. Function 8

i. What: Meetings/Visits – off campus

ii. How: PAE staff members may conduct in-person meetings with individuals (no more than allowed by local limits). Travel by air and rail is not recommended, but may be approved if the staff member is able to follow all health and safety guidelines during this travel, if the location is not a high-risk area, and if the travel is critical to the staff member's work. They must adhere to standards and guidelines related to face coverings, hygiene, distance and safe mobility.

iii. Number of people/positions required on campus: 0
iv. Buildings: N/A

d. Function 9
   i. What: Events – on campus
   ii. How: In an effort to de-densify campus, no PAE events will be conducted on campus. However, exceptions may be made if the purpose of the event significantly advances the mission of PAE and no alternative means of convening are adequate. All participants must adhere to health and safety standards and guidelines. Exceptions for events may be granted by the SVC for PAE and arrangements should be made with the appropriate University entities.
   iii. Number of people/positions required on campus: Smallest number possible; No more than 250.
   iv. Buildings: Dependent on event.

e. Function 10
   i. What: Events – off campus
   ii. How: Off-campus events located within the greater Pittsburgh region may occur as long as all University standards and guidelines are followed, the purpose of the event advances the mission of PAE and no alternative means exist, and the event is capped at 250 attendees. PAE events conducted in low-risk regions may occur, providing all staff and participants adhere to University standards and guidelines and local/regional mitigation steps. All events must be approved by the Senior Vice Chancellor for Philanthropic & Alumni Engagement. Should regional conditions change that would require greater restrictions, the event will be canceled, postponed, or adapted for a virtual experience.
   iii. Number of people/positions required on campus: 0
   iv. Buildings: N/A

f. Function 11
   i. What: Alumni/Volunteer/Affiliate Activity: The Pitt Alumni Association supports and manages volunteer groups who plan and execute engagement opportunities on- and off-campus in order to advance Pitt's mission.
   ii. How: Meetings or events may occur in-person in the greater Pittsburgh region as long as all University standards and guidelines are followed, the purpose of the event advances the mission of PAA and no alternative means exist, and the event is capped at 250 attendees. Events or meetings may occur in locations deemed low-risk, providing local/regional mitigation steps are adhered to. Should regional conditions change that would require greater restrictions, the event will be canceled, postponed, or adapted for a virtual experience.
   iii. Number of people/positions required on campus: Smallest number possible; No more than 250.
   iv. Buildings: Dependent on meeting or event.

g. Function 12

i. What: UPMC fundraising and engagement activity
ii. How: Staff will adhere to minimum health and safety requirements based on Pennsylvania's green phase, with additional guidance from UPMC.
iii. Number of people/positions required on campus: 0
iv. Buildings: N/A

III. Transitions between Operational Postures

As the environment shifts, the University's Senior Leadership Team will make determinations about when the University's operational posture must also shift to either more or less restricted.

PAE plans to create a PAE-specific resilience framework resource center online. As risk postures change, information will be updated here and actively communicated to PAE employees through e-mail, including implications of the change in risk posture. More specific steps are outlined below.

As risk levels decline:

1. Shift from High Risk Posture to Elevated Risk Posture
   - The rotational schedule for Telefund callers will be confirmed and executed.
   - Any meetings, visits or events that were postponed in order to be held in person will be evaluated and approved as necessary.
   - Staff may request approval for University-related travel.
2. Shift from Elevated Risk Posture to Guarded Risk Posture
   - Any meetings, visits or events scheduled with a capacity of 25 participants can be expanded to the maximum number of allowable participants based on social distancing requirements, not to exceed 250.
   - Staff may request approval for University-related travel.

As risk levels increase:

3. Shift from Guarded Risk Posture to Elevated Risk Posture
   - Travel that was previously approved under a different posture, but has not yet been taken must be re-confirmed or canceled.
   - Events, meetings and visits must be capped at 25 participants, or be canceled, postponed, or adapted for a virtual experience. Events previously approved under a different posture must reconfirm approval. All participants will be notified of changes by email and phone by the most appropriate staff member or entity.
4. Shift from Elevated Risk Posture to High Risk Posture
   - Telefund will conduct all work remotely.
   - Travel that was previously approved under a different posture, but has not yet been taken must be canceled, unless an exception is granted.
   - Events, meetings and visits must be canceled, postponed, or adapted for a virtual experience. All participants will be notified of changes by email and phone by the most appropriate staff member or entity.

IV. Stakeholder Outreach

Key stakeholders include PAE staff, and those alumni, students, and prospects who participate in PAE activities. In addition to the PAE-specific resilience framework resource center, PAE leadership will be expected to review the PAE Activity Area Plan with their respective teams to ensure understanding and compliance. PAE staff members that work with alumni affiliate organizations will be responsible for reviewing this Activity Area Plan with these organizations to ensure understanding and compliance. Communications will occur at the beginning of implementation of this plan, as well as every time a change in risk posture is anticipated to occur. Alumni, students and prospects who participate in PAE activity will be notified via phone and e-mail when changes in risk posture occur and directly impact the activity.

V. Monitoring and Amendment

Any revisions to this plan must be approved by the Senior Vice Chancellor for Philanthropic & Alumni Engagement.

This plan is intended to apply to all PAE employees, even those who are embedded in a school, center, or affiliated hospital. Any contradictions between the PAE activity plan and the activity plan of another RC will be resolved by the SVC for PAE and the appropriate activity area lead.

Also note that this activity plan applies to all staff who are formally employees of the Medical and Health Sciences Foundation; they, for all intents and purposes, are treated as Pitt employees.