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Faculty and Staff Breakfast

August 20,2010

This is an exciting day for me, both because we are about to start another academic year and because of the opportunity to meet with you and share my thoughts on several important topics for the University.

Signals that the fall semester is approaching begin relatively early in the summer, usually marked by the orientation program for parents of new students that is held in early July. The pace begins to quicken in late July and early August when we celebrate the conclusion of the Summer Enrichment Program, tour facilities that have been remodeled over the summer, welcome the Resident Assistants for their orientation, clear visa hurdles for the last international student, and host the Leadership Giving Dinner for key donors in Chicago. This week the sprint begins, and I suspect all of you are feeling some combination of anticipation and urgency related to the beginning of the fall semester at Illinois Wesleyan. I want to thank you for your efforts to prepare for the start of classes. I also want to thank Mike Welsh and his staff for their work preparing meals for special groups over the last few days and especially for the breakfast this morning.

In the spirit of thanking people for their contributions to IWU, I would like to make a very special announcement at this time. Each year, the University recognizes the distinguished service of a staff member by selecting someone to receive the Max L. Starkey Award. This award takes into consideration length of service but also focuses on the quality of that service as well. In 2001, at the suggestion of and with generous assistance from Max Starkey's family, we established this award for a staff member whose loyalty, enthusiasm and outstanding contribution in his or her work and assistance to others has provided an invaluable service to the IWU community.

Max Starkey, class of 1957, was Comptroller and served his entire career of nearly 40 years in the Business Office. The awarding of this distinction to an IWU staff member provides continuing recognition of Max's legacy of dedicated service to IWU, its students, staff and faculty. The award consists of a framed certificate, a cash stipend, and recognition on the permanent Max Starkey Award plaque near the Business Office in Holmes Hall.

Everyone who works at Illinois Wesleyan is asked each year to provide nominations of individuals you believe are most deserving of this honor. The number of nominations indicates that there are many people here at Illinois Wesleyan who are thought to be worthy of this esteemed award. These are the people that make Illinois Wesleyan the thriving institution it is and we depend on them for the continuance of this success.

As has been done in the past, a committee of retired staff and faculty are asked to review the nominations and choose this year's honoree. This committee provides a long standing perspective on excellence in serving the Illinois Wesleyan community as well as knowledge of the dedication and loyalty to which Max exemplified so well and which we seek to pay tribute.

And now, this year's clues ...

• In this person's nomination, he or she was described as "positive and upbeat," "loyal" and always willing to "go beyond the call of duty."

• This person's job requires the soul of an investigator. He or she might handle as many as 13,000 cases a year.

• He often works with the Illiad, but Ulysses is never in sight.

• He always does things by the book and is tough to copy, right?

It is my distinct pleasure to announce that this year's recipient of the Max Starkey award is Tony Heaton, Copyright/Document Delivery Coordinator in the Ames Library. Tony, would you please come forward.

The Past Year

Although the last eighteen months have been extraordinarily difficult for the University, for all of higher education, and for our society in general, I must admit that I am very optimistic about the coming year. The source of my optimism can be traced to the fact that we have made decisions and put processes in place that will serve us well and allow us to control our own destiny.

Before going any further, I want to acknowledge that the position of strength from which we now operate can be tied in large measure to the personal and professional sacrifices made by everyone in this room. The adjustments we have made have been difficult (and sometimes contentious), but we no longer must look over our shoulders at financial problems waiting to happen.

To the best of my ability, we have addressed all major problems that had emerged as a result of the collapse of the economy as well as several institutional problems that we had been carrying from one year to the next in hopes that a solution might materialize. It is of considerable relief and at the same time invigorating to know that we can begin to make positive decisions tied to University priorities as resources are available, rather than simply fix problems.

Budget Planning

Much time and energy during the past year were devoted to realigning the University's budget in response to a series of financial challenges tied to the economic collapse, the endowment decline, and the enrollment shortfall last fall. The plan that we developed required significant adjustments in both income streams and expenditure patterns. In the short-term, the goal was to balance the budget for the year ending on July 31, 2010.

The last element to fall into place occurred just a few days ago when the Advancement Office announced that we had met the target established for the Annual Fund this past year. Some

preliminary data I received last week suggests our Annual Fund success is counter to the national trend. So the good news is that we reached the annual fund goal. The better news is that we finally have an annual fund target that is realistic and can be viewed with confidence in our budget deliberations.

Although we won't have a final audited financial statement for several weeks, I fully expect to see a balanced budget for the year that ended on July 31. I will reiterate again that a significant part of this achievement can be traced to the sacrifices made by everyone in this room, both in terms of salaries and benefits but also in terms of constraints on program expenditures.

At the same time that we were devising a plan for last year, we had to focus attention on the future. One of the key variables was enrollment. Staff in the Admissions Office and the Financial Aid Office made a number of adjustments in their recruitment and aid plans, and we began to see results early on in terms of student interest. I think you all know by now that we not only met but exceeded our target for new students enrolling this week. This is the result of sustained effort on the part of the admissions staff but also can be traced to what I consider to be active engagement on the part of the entire university.

This is not only a large class but also one with several important characteristics:

• The average ACT score and rank in class are identical with previous years

• The number of men in the class increased by 70

• The 32 legacy students in the class comprise the largest number in history, a number that increases to 68 if you add all new students who have had a relative attend lWU.

• The entering class consists of 95 ALANA students which is the largest total in history and is the first time that the number of Latino/a students has equaled the number of African American students

We won't have enrollment numbers for returning students for several days, but early registration figures indicate that we will be in the 1450-1470 range. When you combine this total with the corresponding number for the entering class, we expect not only to meet but also slightly exceed our enrollment target of 2050. Although it was painful to reduce our enrollment target to 2050, the decision was wise and will serve us well moving forward.

The budget for FYll also assumed that we would have no general salary increases for the second year in a row and that the reduction in the retirement contribution from 10% to 5% would continue. I do not underestimate the significance of both actions and, with your advice and help, will begin to address these issues as part of planning for FYI2. I will discuss this matter in further detail in a few minutes.

There were several other assumptions in our budget plan for the FYll year that either have been met or seem highly likely: occupancy rates in the housing system (including the fraternities); endowment growth; income and expenses for study abroad programs; and the annual fund.

Although it is important for the University to pursue every opportunity to increase income, we must be equally vigilant about operating in an efficient manner. The concept of "enhanced scrutiny" that we introduced for staff hiring and the "position review" process utilized for approving faculty tenure lines have been extremely helpful in addressing short-term budget deficits and must continue to be used. In my opinion, both processes work better than some of the alternatives employed at peer institutions. The focus on completing our work in the most efficient way possible is not a short-term measure. I believe it is fundamental to all of our plans for the future.

My overall assessment is that the plan and processes we developed last year remains sound and should enable us to end the current fiscal year with a balanced budget. I believe we have the controls in place to monitor all of our assumptions, and I intend to provide you with budget updates periodically.

Salaries and Benefits

As I indicated earlier in my remarks, a significant element in the realignment of operating budgets has been holding salaries constant and reducing the retirement contribution. We cannot continue down this path if we aspire to provide all employees with a compensation package that is both competitive and responsive to inflation.

The adjustments we have made have occurred during a time when all universities have faced budget challenges. The strategies for dealing with economic realities varied considerably, from mid-year rescissions and hiring freezes to furlough days and reductions in force. Every university in the country had to choose among unattractive options for dealing with their situation. When you make a choice, you live with the consequences. I believe we made the right choices, ones that reflected three important principles

• The value of every employee to the University

• The assurance that no one would lose their job

• The importance of taking care of people who are here

Turning to the future, I am determined to begin making positive adjustments to compensation packages for employees. When we reduced the retirement contribution last year, I indicated that we would restore that contribution over time. I made that commitment in good faith and take it seriously. At the same time, it is essential that we provide employees with a salary increase next year. As I think everyone in this room knows, funding for both of these items comes from the same pool of funds, so part of our task in the coming year will be to determine the relative increases for each element.

I intend to make our compensation plan for FY12 the top priority in conversations this fall with SPBC, CUPP, and Staff Council. I do not expect to make a final decision on this matter until sometime in the second semester. We can use the intervening time to develop a plan around what our goal should be over the next few years.

Assessment and Accreditation

If there is a trend in higher education these days, it is the cry for increased attention to the assessment of what students learn in college. This issue is central to the debate on costs and affordability; the discussions on the value of college in general and liberal arts colleges in particular; and the standards used in accreditation. Although some of these efforts are misguided and uninformed, it is hard to argue that we should not be paying attention to how students are changed as a result of a college education.

I am pleased to report that we have several years of assessment experience at IWU. My understanding is that all but two academic departments on this campus are at some stage of designing or implementing an assessment plan for their majors, efforts that replace indirect measures of progress (e.g., student surveys) with more direct attention to measuring student progress on important departmental goals. I applaud the work being done in this area.

The next challenge is to shift our assessment lens from the educational experiences that departments provide to majors to the experiences that are university-wide and shared by all students, particularly our general education program. Some work has been done in this area, but the financial challenges over the past two years were so all-consuming that it was difficult to give this matter sufficient attention. I would like to see that change in the coming year. More than enough time has passed to allow us to assess whether our general education program is having the impact we envisioned and whether it should be changed in anyway.

The Self Study Steering Committee is keenly interested in this matter, and I would like to invite Jim Matthews, co-chair of our self -study committee to come to the podium to make a few remarks.

Transforming Lives Campaign

The Transforming Lives Campaign represents a key source of funding for important priorities and already is having an impact. There are five elements to the campaign:

• The Wesleyan Annual Fund

• Student Scholarships

• Faculty Professorships

• Endowments for Excellence

• Facilities

Our goal for the campaign is to raise $125 million. When we announced the campaign in May, 2009, we had received $73 million in gifts and pledges. Since that time we have added another $9.5 million, about equally divided among the annual fund, student scholarships, professorships,

and facilities. Sixty percent of the gifts and pledges we have received are for current use while forty percent is deferred (estate commitments or annuities).

One of the most exciting gifts received this past year was from Byron S. Tucci, member of the IWU Class of 1966 and IWU Trustee. Byron's gift established an endowed professorship that is open to faculty members from any department on campus. The Committee on Endowed Appointments met during the spring semester and forwarded their recommendations to me in late April. The nominees had an inspiring record of teaching and scholarship in many disciples across the entire campus. I am grateful to the Committee for its diligent work and advice regarding the appointment.

I am pleased to announce this morning that the inaugural recipient of the Byron S. Tucci Professorship at Illinois Wesleyan is Carolyn Nadeau, Professor and Chair of the Department of Hispanic Studies.

Carolyn has been a member of the faculty since 1994 and received the University's award for teaching excellence in 2003. Her passion for creative and dynamic teaching defines her as a teacher/scholar and role model for our faculty and students. Carolyn specializes in 16th and 17th century Spanish literature and culture, is the author of two books and more than a dozen articles, and will soon appear in a film about 21st century Spain. A participant in two NEH Summer Institutes and recipient of many grants, Carolyn has also been honored with Cultural Cooperation grants from the Spanish Ministry of Culture.

Carolyn has served at the highest levels of the University--coordinating the First Year Advising Program, developing and implementing both the London and Madrid Program, and serving on many committees. As chair of Curriculum Council, she is leading and coordinating the effort to revise the General Education Program. She is a well-respected senior faculty member and a distinguished addition to the list of endowed chairs and professors at Illinois Wesleyan. I am delighted that Carolyn will hold the Byron S. Tucci Professorship, a sign of distinction and honor in our community. Carolyn will be formally invested at Commencement in the spring.

We have received three other deferred gift commitments for endowed professorships during the campaign which, along with the Tucci Professorship, will be matched 1: 1 by the Ames Challenge. These new commitments will increase the number of endowed professorships over time from 13 to 21. We are well on our way to achieving the campaign goal of 30 endowed professorships by the end of the campaign.

The second category in which we have received significant support is student scholarships. Thus far, we have gift, pledges, and deferred commitments totaling $8.4 million (get data) for endowed scholarships The wonderful thing about these endowments is that they will produce roughly $400,000 in annual income for student scholarships once all the endowments are activated.

In terms of facilities, I think you are aware of the lead gift for the new classroom building that we received two years ago The design work has been completed for this project, and we hope to secure the remaining funding before the end of the academic year and to begin construction right

after May Term. As I have indicated on numerous occasions, we will not start this project until we have all of the funds required to construct this new building.

During the spring semester, we received another facility gift, one designated for the remodeling of Presser Hall. Some of the work was completed this summer. The donor visited campus recently and was so pleased with the results of the effort thus far that he and his wife have made a second gift for additional remodeling next summer. The importance of these gifts is tied not only to improving the quality of an existing facility but also accelerating the timetable for other projects on our capital projects list.

Students

Over the last month, I have had several opportunities to interact with several current students and a few recent graduates. These occasions included one of the final class meetings of students engaged in internships coordinated through the Action Research Center; the graduation luncheon for students in the Summer Enrichment Program; the presentations and performances at the Leadership Giving Council dinner in Chicago; and the Minority Alumni Network Picnic, also in Chicago.

As I listened to their stories and songs, I could not help but think about the richness of the curriculum and co-curricular activity at IWU and the impact the University has had on the lives of these students. I also allowed myself to imagine the kind of impact that they will have on others in the future:

• Devon Boydston's inspiring commitment to establishing a Medical Brigade at lWU that would serve the people of Honduras

• Charlene Carruthers' decision to spend the next few months in Haiti in order to be actively involved in community development in an country facing serious challenges

• The impressive vocal performance by Amelia Ciskey at the University Club in Chicago

• Stephany Swope's internship experience this summer that allowed her to confirm her commitment to working in the not for profit sector following graduation

• The very compelling and sometimes even emotional statements made by students in the Summer Enrichment Program about the impact of their summer experiences on them both academically and personally.

Each time I have these experiences, I walk away thinking that this is the reason that we have chosen to work at Illinois Wesleyan. I take my inspiration from these encounters and know that we will find ways to solve any problems that might emerge because the opportunity to transform the lives of 2000 students every year is so compelling.

Thank you very much.