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## 2017 State of IWU address

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## **Starkey Award presentation**

## **Be Breakthrough video**

## **Remarks**

Thank you to LeAnn Hughes, Andrew Kreiss and their team for that video.

## **What you may have missed over the summer**

You may recall that last year, Dan Klotzbach and John Bryant put together a refinancing of some of our bond issues. It's a lot like refinancing your house--when rates are low, there's a lot to gain. In our case, we have \$10M to use for the purposes the bonds were originally for--buildings and grounds--at no net cost to us. Work began last summer, and work on other much needed repairs continued this summer. Thanks for all the continuing hard work from Jim Blumberg and all in the Physical Plant crew.

Last spring, we engaged in a search for a new Provost. With great gratitude to the search committee ably chaired by the hardworking Stephanie Davis-Kahl, we identified Mark Brodl. Thank you Stephanie, and your search committee, for your efforts. Previously at Knox College and Trinity University, Mark arrived in Bloomington last month, and has hit the ground running. This is also our first official opportunity in this setting to welcome LeAnn Hughes and Steve Seibring into their new positions. Please join me in welcoming LeAnn, Mark, and Steve, and in thanking Mark's search committee. (applause)

## **Diversity**

I've worked with Karla Carney-Hall and Mark Brodl to write a letter to the college community as the year begins. The enduring purpose behind institutions of higher learning like Illinois Wesleyan is to provide a venue to ask hard questions, discover deep truths, and come to terms with our shared humanity by learning from those who are alike and different from us. The hallmark of a liberal arts education is a focus on critical thinking and problem-solving.

It is sadly true that, as was the case last year, the national climate surrounding race, economic inequality, and other controversial topics is difficult. It is our job to help our students--each and every one of our students--as they navigate difficult waters. It is our obligation as faculty and staff to ensure that students are equipped with the tools of inquiry, conflict mediation, and debate. Through this, students are empowered to engage ideas through logic, not raw emotion; through facts, not fear; and through inquiry, not insensitivity. As faculty and staff, we must be prepared to help facilitate these very difficult conversations. We must ensure that issues are debated and points of view are heard. We must further ensure that it is **not the volume with which an argument is put forth**, but **rather its rigor**, that carries the day. In these and other ways, we must convey our shared understanding that free speech and diversity, far from being incompatible goals, go hand in hand with accomplishing meaningful progress.



One of my priorities is to increase the economic, ethnic, geographic and racial diversity of the Illinois Wesleyan student body. We are not yet where we could be, but we are moving in the right direction. Our first 10-student Posse, from New Orleans, came to town last week. Meaghan Burke will serve as their mentor and Karla Carney-Hall will coordinate the effort. Including these students, the incoming class at Illinois Wesleyan is now **a bit more than one-third** black, hispanic, Asian, multiracial, or international.

It is important to enhance our diversity, however defined, for two reasons. First, our historic roots as a Methodist institution give us a mission. We transform lives, and we can prove it. Recent data show that we're among the very best at taking students from low-income families and producing graduates at the highest incomes. We are not taking in as many of those students as we should. This suggests a clear path forward, which we are pursuing. Second is that all of us, but especially each and every one of our students, benefits from a living and studying in a more ethnically and racially diverse environment. We train leaders. We always have and we always will. But today's leaders, **and especially tomorrow's leaders**, will lead in multiracial, multiethnic and multinational environments. To fulfill that charge, our students need the kind of vibrant environment that a diverse campus provides.

There is one more important part of this puzzle. One of my priorities for the coming year is to increase the number of ethnically and racially diverse faculty and staff members. I share this priority with senior leadership, and with the arrival of Mark Brodl, will be working especially intensively with the new Provost and the faculty to incorporate active pursuit of this goal in faculty hiring.

### **Strategic Investment Plan**

Last February, the Board of Trustees approved a Strategic Investment Plan, focusing resources on the three legs of Academics, Admissions, and Advancement. The goal of the plan is to better position Illinois Wesleyan as a premier national liberal arts college. The plan took effect on August 1 of this year.

In Academics, Signature Work initiatives will be funded. These student centered initiatives are intended to enhance and broaden the student-centered, individualized nature of an Illinois Wesleyan education and, in so doing, amplify the appeal of our institution to potential students. The Strategic Investment Plan also provides for new Admissions and Advancement efforts.

Work on the Plan has begun in earnest, with resources committed and hires being made. A component of the plan is to avoid any reductions in capacity that might have come with a budget deficit. It is a multi-year plan, with some flexibility in expenditure a part of its design. It is also a plan in which initial expenditures, beginning this year, are envisioned to be somewhat larger than later years, as revenues are projected to increase as the impact of the Plan is felt.

I'm very optimistic about the eventual impacts of the Plan. We know that schools that differ from us mainly in the clarity of their national academic reputations have done well. Yesterday, with the Provost, Vice President of Enrollment and Marketing, and Vice President for Advancement, I visited Agnes Scott College in Atlanta. They are three years into the implementation of a personalized and innovatively marketed effort, much like ours, and have had their three biggest admissions years in decades. Like us, they are engaged in a long term investment in themselves, and their success was inspiring to all of us. We took careful notes! We also know of one (and only one) example, in our tough state of Illinois, where enrollments significantly without large increases in tuition discount. Their secret: a coherent set of revisions to their admissions and enrollment processes. The changes in our admissions, enrollment, financial aid and marketing that we are implementing, which come on line in the current admissions cycle, mirror the changes made there. And we know of other schools where alumni and other friends of the institution rally around clearly stated goals. We are only 3 weeks in, but we are on the path we need to follow.

Unfortunately, with the exception I mentioned, this has been a very tough year to recruit students in Illinois. Many schools saw admissions declines along the lines that we did, and those that didn't offered huge tuition discounts in order to maintain enrollment. In one of our competing schools, discounts are so extreme that they are taking in about half as much per student as we do. We, as you all know, are pretty lean. It's hard to picture how to deliver a quality education with half the resources per student devoted to the task.

This year, we had 418 new students move in. That is a smaller class than we have seen for some time. They are diverse. They are of the same high quality that we are used to seeing. But there are fewer of them than we would like to see. There are some consequences.

First is that it has caused a larger than expected operating deficit. We expected a deficit, but as a result of the small incoming class we will draw more out of the Strategic Investment Plan in the first year than we had initially planned to draw.

Second is that to preserve allocated Strategic Investment funds for subsequent years, we will make some reductions in planned FY18 spending. We will spend less on the Banner upgrade than originally planned. We will suspend most tenure-line searches, and we will capture the chronic budget surplus in the Mellon Center. We will leave positions open for 30 days, and postpone spending on e-gaming renovations until next year. While we will continue to fill positions with visitors where tenure-line positions are authorized, we will **not** cut positions. We will

maintain budget raises and pension contribution increases, and **we will continue Strategic Investment Plan spending.**

These actions are supported by the Board of Trustees, because these are revenue drivers for subsequent years, and the key to our budgetary constraints is the long-run growth of tuition and other revenue. We need the SIP elements in place for revenue growth to happen. While it is unfortunate that we need to make these investments in ourself in a time of tough budgets, that very toughness underscores the urgency. You heard one of my favorite cliches on this but let me deploy it again--the best time to plant a tree is 20 years ago, but the second-best time is today.

So we come to the question--what can each of us, individually, do to influence the outcome? It comes down to those three legs of the Strategic Investment Plan--Academics, Admissions, and Advancement.

In Academics, what can I, or my department, or my program do to make a more student-owned, personalized experience central to every student's time with us? Call it Signature Work, or perhaps call it something else, but make it reflective of this special place. Let me call out just a few of the exciting paths to this goal. Think of History, with their multiple tracks, from documentary filmmaking to public history. Or of Math, with their portfolios capped with a variety of culminating experiences. Or of Environmental Studies, with scaffolded support of culminating interdisciplinary, integrative, problem-based group projects. With apologies to the many other exciting ideas that I've heard in various states of development but did not specifically call out, let's move all of these forward. You have a willing partner in Mark Brodl.

In Admissions, our biggest asset may be our community. LeAnn Hughes and her team truly understand this, and so this year will make active use of alumni, faculty, staff and students in recruiting. You are, each of you, a great example of why this place is so great. In ways large and small, we can make a difference. I was talking to Andy Kreiss, the new Director of Marketing (and class of '86) the other day, about how we pick up trash on the way to work. I admitted that I was little worried that people might talk about seeing me walk to work with a can of Bud Light in my hand in the morning! Seriously, we've all got roles, large and small to play in this effort. I know that you want to do this--the affection for this place is palpable--and will respond as needed.

And finally, in Advancement, we'd like to put many of you, but especially faculty, to wider use in raising funds. When the phone rings and it's Steve Siebring or one of the Advancement officers, please know that they value your help. Please know also that affordability is a key concern in Advancement efforts. We face an economy in which the middle class (the Illinois Wesleyan wheelhouse) has never really recovered from the Great Recession, and are engaged in a diversity recruiting effort that necessarily must acknowledge economic diversity. We therefore are devoting significant effort to raising funds that will increase our ability to provide need-based financial aid.

I think you know by now my conviction that we need to reduce our reliance on merit-based aid. This is nothing but a discount offered to entice capable students to enroll here. Accessibility for economically diverse students (those coming from the majority of families, since the Great Recession) requires that we change the mix in favor of need-based aid. In addition, we want in the long run to reduce our discount rate, at least a bit. To accomplish this, we don't need to become irresistible--simply slightly less resistible. This is about our perceived quality vis-a-vis our competitors, and small changes are likely to generate important results.

I've talked a bit, today and previously, about shared ownership, and that all of us here are shared owners of this great place. It's important to note that we have as co-owners the Trustees. They understand the need to invest in this place, and the commitment of each of you to its success. They also understand that the investment may take time to bear fruit, and they have committed to supporting us in this effort.

I said to you last year, and I repeat today, that I take as given that our niche is high-quality, personalized education. I bet then, and continue to bet, that you do, too. It's also undeniably true that we rely on tuition revenue to accomplish our work. Given these facts, it seems clear that we need to make who we are and what we do clearer to a larger population. We've launched the plan that will do that, and I'm sure we'll share both excitement, and trepidation, until we begin to see results.

The senior leadership team and I will work with the President's Advisory Committee, entering its second year of operation, and other committees on campus, to ensure continuing transparency in finance and budgeting.

So in closing, thank you for your dedication to Illinois Wesleyan. As wonderful as our campus may be, it is you who make it the special place that it is. Let's make this year another great one for our students!