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Minutes

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**October 19, 2007**

Alumni Association Executive Board, Illinois Wesleyan University

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**Illinois Wesleyan University Alumni Association  
Minutes of the Executive Board Meeting  
October 19, 2007**

**Board members present:** Ray Berger '70, Todd French '93, Guy Gebhardt '69, Marsha Guenzler-Stevens '78, Deon Hornsby '97, Scott Huch '86, Jennifer Jones '94, Sundeep Mullangi '97, Jim Mullins '03, Gary Ohler '87, Kelly Petrowski '08, Justine Robinson '06, Fran Rouzee '66

**Board members unable to attend:** Josh Butts '01, Sherry Graehling '72, Dean Jukovich '93, Brian Lewis, Muneerah Maalik '00, Marilyn Neis '71, Tom Neis '70, Amy Olson '90, Tracy Wych '77

**IWU Administration/Staff present:** Jane Banes, Emmalyn Dickinson, Celeste Flachsbart, Ann Harding, Jennifer Krause, Matt Kurz, Jeff Mavros '98, Steve Seibring '81, Jennifer Shaughnessy '98, Trevor Sierra '05, Marty Smith, Lora Wey '88, Richard Wilson

**Welcome**

Todd French opened the meeting by welcoming the new members:

- Jim Mullins '03,
- Gary Ohler '87,
- Justine Robinson '06.
- Josh Butts '01 (unable to attend the meeting), and
- Dean Jukovich '93 (unable to attend the meeting).

He followed this welcome, by introducing President Wilson and asking him to give the Board an update on the University.

**President's Report:**

President Wilson reported the following:

**State of the University:**

- Entering class for 2007 = 575 students.
- Overall enrollment at IWU is around 2,100 students which is our target number.
- IWU is still trying to grow the campus to handle 2,100 students—approximately 350 – 400 students currently live off campus. IWU is looking to resolve this problem over the next two years.
- The University received its largest group of international students this year—25.
- Over the last three years IWU has enrolled approximately 300 minority students (African-American, Latino, and Asian); or, approximately 100

minority students per year. In prior years, we enrolled approximately 50 per year.

- Two years ago IWU implemented a summer reading program for incoming students. This year students read *Mountains Beyond Mountains* by Tracy Kidder. The program has become not only a first-year student experience, but a campus-wide experience. Faculty, staff and many upper-class students read the text and participated in the discussion groups with new students. And, this year, for the first time, trustees and alumni from the community participated in the program. Three weeks after student orientation, Tracy Kidder spoke at the President's Convocation.
- This past weekend a student was assaulted on the quad. The student was seriously hurt, but has recovered and is expected to return to campus this next week. At the time of the incident, an emergency alert immediately went out to all students. Everyone in the IWU Community and parents were sent a status report on Monday explaining what had happened and what the University was doing about it.
- The Dean of Students is heading up a task force to look at what can be done to tighten campus security and provide additional protection. President Wilson enlisted Executive Board members to help dispel any rumors and allay any fears by communicating to others what happened and what the University is doing to improve security.
- The injured student and his parents have expressed gratitude for the unbelievable response they received from the University and IWU students. The student is anxious to return to school.
- In response to a question regarding the quality of the area surrounding IWU, Wilson noted that the area has deteriorated over the past 20 years and IWU has begun to systematically buy up this property as it becomes available.

### Capital Campaign

- President Wilson distributed a reference document pertaining to the capital campaign.
- This past year was spent determining the University's priorities for the capital campaign. Discussions were held with faculty, staff and students. At their retreat this spring, the Trustees reviewed the list developed from the campus-wide discussions. And, this group (AAEB) was solicited for input at its meeting in April of this year.
- From all the information gathered, a case statement was developed; i.e., the rationale for the campaign.
- The tentative campaign theme is—***Transforming Lives***. The reason for this theme is based on interviews with alumni and faculty who described their experience at IWU as transforming their lives.
- A summary of the priorities identified for the campaign emphasized increasing the endowment rather than adding facilities.
- IWU's Administration formed a feasibility study committee made up of seven trustees, and hired a consultant, Johnson, Grossnickle & Associates. The committee identified 50 people, a combination of alumni, trustees, and

- friends, to be interviewed by the consultant to *test the temperature* for a campaign. The findings from the consultant interviews will be presented to the Board of Trustees on October 22<sup>nd</sup>.
- The real goal for the Capital Campaign will probably not be set for another 1½ years. Wilson emphasized that it is much more important right now to look at the priorities.
  - The major findings from the interviews conducted by the consultant were as follows:
    - IWU is performing its mission at a high level
    - There is pride in the University
    - IWU has a strong regional reputation that compares favorably with other private colleges.
    - Interviewees believe that the preliminary case for support affirms IWU's ambition, but does not call them to action. (Wilson feels we have not made the case compelling enough, and we need to structure these needs in a way that will encourage alumni and friends to contribute.)
    - Responses to the *Endowment for Excellence* were mixed. Some interviewees felt the programs listed were things the University should already be doing and did not fit into a special gift goal. Other interviewees were not clear as to the purpose of these programs. This category was not as well received by the interviewees as were other priorities listed for the Capital Campaign.
    - Although interviewees were not sold on the need for the *Endowment for Excellence* component, they embraced the general concept of increasing our endowment.
    - Facilities engendered a positive response from interviewees, with more interest in classrooms and student housing than in the performing arts center.
    - Interviewees questioned the University's ability to raise \$100 million. They also had some concern about the timing of the campaign.
    - There was great enthusiasm for the planning and the strategy that is going into this campaign.
    - The interviewees recognized that to be successful the University must identify a large number of volunteers to help this process in a variety of ways.
    - Respondents felt the campaign was necessary, but not as many felt *passionately* about it.
    - The campaign must build on the identity study
  - The consultant made the following recommendations:
    - IWU should conduct a campaign and should continue making preparations for a campaign
    - The University, in many respects, is ideally positioned to conduct a campaign.
    - The University must look at the campaign both in the short term and the long term. In the short term, IWU wants to raise the money to meet

its campaign goal; but, in the long term, the University wants to build a base of sustained philanthropic support over many years.

- Marty Smith and his staff need to begin intensive preparation for the campaign.
- The University should refine the case for support of the campaign to make it more persuasive and compelling to people who will be looking at it.
- IWU needs to create a comprehensive communication plan for the campaign.
- And, the University needs to move forward with confidence and enthusiasm.

President Wilson reported that the Trustee meeting on Monday and Tuesday will include breakout sessions to go through the campaign plan in detail.

A question was raised as to the breakdown of alumni surveyed. President Wilson noted that the alumni who were surveyed were primarily older alumni because the University wanted to gauge what the support would be among those who were best able to do the gifting.

He feels that the University needs to look at connecting with young alums in other ways, so that every time a representative from the University walks in the door he/she is not asking for money. The University doesn't want to lose them for the next twenty years.

President Wilson explained that the dramatic hit to the endowment in 2001 (falling from approximately \$210 million to \$130 million in 12 months) caused a huge problem for the University. He noted that the University is now creeping up on getting back to where it was six years ago (as of the first of August this year, the endowment is up to about \$190 million), but when you look at IWU's peers it is very clear that the University needs to increase its endowment to about \$300 million as quickly as possible.

Wilson's goal is to get the University above the \$300 million endowment within the next five years.

### **IWU's Identity:**

Matt Kurz, Vice President of Communications, summarized the findings of the Lawler Group (a consulting firm specializing in marketing and communications for private higher education) hired by the University to study its identity. The findings are to be presented to the Board of Trustees at its next meeting (AAEB has access to the findings before the Board of Trustees). A summary of the Lawler Group's findings are as follows:

#### ***IWU's Identity Today:***

- The current perceptions for IWU are strongest for its attributes—not its excellence. Findings described the University as:

- Small, clean, safe, friendly, welcoming, personal attention **versus** academically challenging, great teaching, successful graduates
- Regional not national reputation
- Some common themes, but no real consistency
- With no recent efforts to codify an identity, this is not surprising
- Prospective students have a very superficial awareness of IWU, drawn mostly from its name
- Common adjectives describing IWU include:
  - Midwestern, ethical, moral, religious, friendly, regional not national

#### What Do We Want to be Known For?

- Much more consistency in what we want to be known for, and much more substance
  - Academic excellence and outcomes are consistently at the top of the list
  - But, can't ignore the Wesleyan experience, which is linked to high satisfaction among students and alumni
- Implications
  - This level of consistency will make it much easier to create a consistent message that external audiences will relate to and internal stakeholders can support.
  - Our desired identity is a combination of the rational and emotional—academics, outcomes and experiences

#### National Reputation

- Stakeholders also want the University to be nationally regarded
  - Reputation adds value to degree, attracts top students and faculty, and helps to rationalize cost and reduce importance of financial aid
  - National reputation means the most to faculty, parents and alumni
- While diversity did not consistently make the short list of desired attributes, it was high on the faculty/staff lists for short and long-term focus (and also, one of the areas rated most in need of improvement by all audiences in terms of current satisfaction)

#### Changing Perceptions

- We share a common vision in terms of our aspirational identity—it is realistic and honest, not too far from where we are—it is reachable
- Implications:
  - It's not about changing who we are, it's about changing the way we think and talk about IWU
  - There's no "quick fix" to successfully change perceptions—it will require a long-term commitment, resources, patience and consistency

#### External Challenges

- We have more work to do with external constituents like prospective students and high school counselors, than with our internal stakeholders

- Implications: Sharpening our messages and strengthening our programs to reach key external audiences should be a priority. Also, word-of-mouth can have a significant impact, so maintaining current high levels of satisfaction among students, parents and alumni is key

### Liberal Arts Plus

- IWU is known more for its liberal arts emphasis; however, professional programs can help to differentiate us
  - They make us different from most other liberal arts schools
  - Professional programs can also help us reach students who might bypass a small liberal arts school, because they assume the professional programs are only found at bigger schools
  - The coexistence of professional programs at a liberal arts institution is an *operational* not an identity issue.

### ALUMNI: Capital Campaign Impact

- Involvement key to support
  - Overall, 8 in 10 alumni rated their own Illinois Wesleyan student experience positively
  - And yet:
    - Only 25% donate to IWU—about the same percentage who say they feel *involved* with IWU
    - Fewer than a third say the university tries “very well” to involve them
    - Only a third feel we communicate “very effectively”
  - Implications: Involved alumni are two to three times as likely to be very supportive than uninvolved alumni. So, investing in programs that build involvement—prior to the Capital Campaign—will be key, given the potential return on investment
- Pride builds involvement
  - Involved alumni have more pride and feel their degree has more value than uninvolved alumni
  - Reputation matters to alumni
  - Only faculty rated reputational attributes higher than alumni
  - Implications:
    - Alumni communications and programs should reinforce academic reputation, position IWU nationally, and highlight the success of our graduates, while reminding alumni of the Wesleyan experience
    - Messages should *touch alumni hearts* as well as their minds, if we want them engaged for the Campaign
- Keeping alumni connected
  - The major reasons why alumni do not stay involved related to “distance from campus,” “other priorities in life,” and simply “losing touch”
  - Campus visits are strongly linked to involvement and support but not always feasible

- Implications: Recent strategies to address life cycle and proximity to campus should be continued and strengthened; i.e., current alumni programs, alumni travel, career networking, connections that bring faculty and students to events, etc.

### Prospective Students: Admissions Impact

- Understanding the college selection process
  - What kind of college?
    - State school, big, small, two or four-year, etc.
    - Of the 17.5 million college students enrolled at 4,200 colleges and universities, only 526,000 are enrolled in the 267 private liberal arts institutions
  - Implications: IWU is competing for part of a very small slice of the overall pie. Therefore, we need to focus our efforts on areas of greatest opportunity and growth potential—can't lose our base trying to grow.
- What schools could work?
  - In Illinois only 13% are very familiar with us, while in the Midwest and remaining U.S. only 1 – 2% have any familiarity (8 in 10 know little or nothing about us)
  - Key sources of information are mailings, the Web, college guidebooks, campus visits
  - Implications: Education is what brings prospects to the category, so to breakthrough we need to establish our academic excellence. The Web provides opportunities to reach new prospects and tell our story
- Do they have my major?
  - To be a viable option a school must have the right program offerings and a good reputation in those fields
  - Our professional schools broaden our appeal and help to differentiate us from other liberal arts colleges
  - Implications: Starting with our Web home page our communications need to focus on high profile and popular programs that can reinforce our excellence and the range of programming we offer
- What's their reputation?
  - Education is the key category motivator and how our reputation is perceived versus other institutions will either keep us in consideration or drop us off of the prospect's list
  - Also important is the outcome of an education—preparation for a career or graduate/professional school
  - Implications: Besides our academic excellence, the success of our graduates helps to build our reputation and preference
  - Current students can make or break reputation, while ours are quite positive, they do have concerns about diversity, registration, advising and housing options
  - Implications: These concerns are fixable, and addressing them can have positive impact on word-of-mouth endorsements and on involvement and support from these future alumni and potential donors



- Would I be comfortable there?
  - In addition to the rational parts of the sale—academics, programs reputation, etc.—there are emotional or experiential components related to size, campus facilities and environment
  - Implications: Enrolling top students can ultimately come down to personal attention, the curb-appeal and friendliness of our campus compared to other choices. These are key aspects of our identity that we should not lose sight of
- Can I afford it?
  - Financial-aid is also a key decision making factor, because of the investment and what it says psychologically about our interest in the prospect; i.e., we really want you so here's a great aid package
  - Implications: While we need to have competitive aid packages, we can also offset cost by promoting the success of our graduates and enhancing the value of our degree

### Success Factors

- National recognition of our academic excellence, successful graduates, a great experience, campus “curb appeal” and competitive financial aid are all critical success factors for IWU
- Investing in our success through the Capital Campaign will return to our alumni a more prestigious degree and greater pride in their university

### Homecoming Report:

Ann Harding reviewed all the scheduled events for Homecoming 2007. She also introduced the new Events Coordinator for the Office of Alumni Relations, Connie Vail.

### AAEB Announcements:

Todd French announced that Mark Aubry has resigned from the Board and Amy Olson may have to resign due to family obligations.

The Board wants to honor Jean Baird's service to the Alumni Association and has decided that it will give a brick to the Welcome Center in Jean's honor.

Todd reported that the Board of Trustees retreat last spring at Hamburger U (Oak Brook) was very productive. The meeting laid the preliminary groundwork for the upcoming Capital Campaign. One thing that came out at the meeting was that Trustees felt a disconnect to alumni.

Todd announced that the Reunion Committee has now been re-constituted as the Homecoming Committee. Amy Olsen was the chair of the Reunion Committee, but given her family obligations, we will probably need someone else to take over the responsibility of chairing the Homecoming Committee. Todd encouraged all new AAEB

members to attend as many Homecoming events as possible—keeping in mind that we are looking for new ideas for next year's Homecoming, we are looking for a potential Homecoming Chair, and we are looking for people who might be willing to chair their class reunions for next year.

### **New AAEB Committees:**

Scott Huch reported the formation of the following committees:

- Young Alumni Committee – the head of this committee will oversee the Young Alumni Committees formed at the regional level. (Young alum is defined as someone who has graduated within the past 10 years.)
- Greek Alumni Network—Scott noted that we need to look beyond class year to organize alumni. We need to provide the opportunity for alumni to organize around affinity/interest groups. Right now, IWU does not provide much information as to what is happening within the sororities and fraternities on campus. Scott feels it would be advantageous for our Greek alumni to have more information regarding what positive things are going on with the Greek's on campus. He noted that there are a lot of universities around the country whose alumni associations have very active Greek alumni affinity groups.
- Pride Alumni Council—IWU's lesbian and gay community has asked that we have an alumni group for them. In researching other colleges/universities throughout the country, we found many schools that have an active pride group, and it appears that the establishment of this affinity group will meet the needs of many IWU alums.

### **Committee Reports:**

- Career Networking: Todd French reported that with Mark Aubry's resignation, we need a new chair for Career Networking. Todd will oversee the activities of this committee until a new chair is appointed. The person who chairs this committee will work closely with Scott Huch's group to develop a career networking database. Each region will eventually have a career networking chair.
- Volunteer Workshop: Trevor Sierra reported on the agenda for the afternoon's volunteer workshop. He noted that the format this year had been changed. AAEB committee chairs will provide an overview of the activities of the Alumni Association to volunteers in a general session rather than have volunteers break into groups to discuss a specific activity. Following the overview, the volunteers will hear a panel discussion regarding Environment Sustainability. Following the panel discussion, breakout sessions have been planned for groups that specifically requested an individual meeting.
- Pride Alumni Community: Ray Berger announced that today IWU joins a group of distinguished colleges that recognize their gay and lesbian alumni and realize the great contributions they can make to their University. Josh and Ray have been reviewing mission statements from other universities in order to write a mission

statement for IWU's Pride Alumni Community (PAC). Ray read the draft he and Josh had created. He reported that today, he and Josh will introduce the PAC to alumni at the volunteer workshop. And, PAC will hold its first reception this evening in the Turfler Room following the President's reception. Ray encouraged all AAEB members to attend. Ray reported that PAC would like to establish an annual event at homecoming, develop fundraising events targeted for this group, and create regional networks (combine gay and lesbian alumni from various schools located in our regions to provide a bigger group for activities).

- Regions: Scott Huch reported that the program established four years ago continues to work and he believes the regions are ready to move to the next step—rolling out a number of the programs that complement the programs existing at the Executive Board level. Progress this next year will be based on the number of regions where we have a regional board composed of people who are coordinating the local effort for the various programs (career networking, admissions, annual fund, minority alumni network, etc.). Scott envisions that eventually the structure of the regional boards will mirror the structure of the AAEB and that AAEB chairs will be in direct contact with the people in charge of those committees in the regions.
- Parent Board: Jennifer Krause distributed the new 2007-2008 IWU Parent Board Guide. The guide includes the Parent Board's Mission Statement, a list of Member Responsibilities, and a Calendar of Events for the year. Jennifer reported that a record number of students (7) were assisted by the Parents' Fund this past year. In the fiscal year 2006, the Parent Board raised \$59,000, in fiscal year 2007, it raised \$120,000, and this year the goal is to raise \$130,000. Currently there are 23 very active members serving on the Parent Board (almost double the number in previous years). The Board's long-term goal is to endow the parent fund. The article that ran last year in the IWU magazine was very effective in highlighting the Parent Fund and increasing the number and amount of donations.
- Newsletter Editors: Fran Rouzee reported that she now has 50 class newsletter editors. She needs an additional 15 editors. This fall, 7,095 newsletters were sent out (approximately 2,000 more than were mailed in the spring). Approximately 41% of the newsletter editors participated this fall compared to 37% last spring. Fran would like all the newsletter editors to publish at least one class newsletter per year. Fran noted that the statistics she reported did not include the extra mailing she did last spring. Fran sent out a generic newsletter to those classes that did not have an editor notifying the class members that this would be the last newsletter unless someone from the class stepped forward to take over as editor. Fran did get four volunteers as a result of that mailing. Fran is trying to find someone to volunteer to do a newsletter for a group of classes. She reported that nine newsletter editors have registered to attend the volunteer workshop. And, she reported that Carla Fritz has left IWU, but the University plans to retain her on a part-time basis to coordinate the class newsletters. She is also working with the Alumni Office to see how we can put the newsletters on Titanpride to give all alums the opportunity to find out what is happening with all the classes.

- *Council for IWU Women:* Marsha Guenzler-Stevens reported that the Council for IWU Women is off to a terrific start. Activities for the past year included the following:
  - An outreach letter was sent to all first year women students
  - Profiles of all council members been put on Titanpride for students, as well as alums, to access
  - A new member recruitment process has just been completed, and a number of new members will be at the council's meeting this afternoon.
  - One of the council's very active faculty members, Sammie Robinson, is no longer with the council. She has taken a professorship position at another university.
  - The annual fundraising letter has just been sent to established council members
  - A conference was held last spring for a day and a half for all council members, IWU women students, faculty and staff.
  - The council's first monetary awards were presented to four IWU women students at its spring conference.
  - Last spring's conference was so successful that it will be used as a model for the 2008 conference.
- *Minority Alumni Network:* Deon Hornsby reported that MAN was busy now with the various homecoming activities. He announced that there would be no auction this year at homecoming. The network is concentrating its efforts on a more formalized event in February to celebrate MAN's 15-year anniversary. He noted that the thing he and Muneerah are struggling with the most is getting participation from volunteers. They are working on getting more people involved on the MAN Board. They are especially concentrating getting the 2000 – 2004 alums to be more active. Although their terms have expired, Deon stated that he and Muneerah will not give up being co-chairs of MAN until they have someone ready to replace them.
- *Annual Fund:* Sundeep Mulangi reported that the annual fund raised \$1.8 million, approximately \$200 K over last year. He noted there was a fall-off in donor participation this past year, but the good news is we are raising more money. He reported that this year they have tried a number of things to gather information, primarily through Titanpride.org, and to increase participation. This year the annual fund held a phonathon in the Chicago Region. He noted that the recent national trend has been for people to give more money to fewer causes rather than support a larger number of causes with fewer dollars for each. Sundeep also reported that he had recently visited Nate Hilding's and Jason Akemann's new restaurant, *The Boundary*, in the Wicker Park section of Chicago. They own the restaurant with four other IWU alums, and Sundeep noted that it was an outstanding setting and hoped we could promote the use of it with our alums. Ann Harding reported that the Chicago Region has used The Trace (their bar in Wriggleyville) in the past for Chicago Regional activities and, that; the Alumni

Office was featuring the opening of their new restaurant with an article in Titanpride Highlights.

- Regional Admissions: In the absence of Jennifer Shaughnessy, Scott Huch reported that Jen and her staff have been working with 180 alumni who have entered their profile on the admission's database. This past January through April, these alumni phoned students who had been accepted for admission to welcome them to IWU. Jen has indicated that 180 alums are not nearly enough to handle this task, so there is great opportunity to grow this program. Jen and her group wanted to start with alumni phoning and then move toward having alumni represent the University at college fairs and high school visits. The Admissions Office believes that this type of alumni involvement will help improve the University's national numbers. Eventually, they would like to see alumni in the various regions hosting events in their homes and inviting prospective students to our regional connections. In this coming year, Scott and the Admissions Office will be working to take this program on for the Board and recruit more volunteers. Right now, they are prepared to expand to Colorado, California, Texas, New York, and Boston.
- Student Senate: Kelly Petrowski reported on the undergraduate homecoming activities which today includes tailgating followed by the Titan Games and a date auction. Tomorrow the undergraduates will be involved in the beam signing, football game and homecoming dance. She invited alumni to attend any and/or all of the events.

### **Adjournment**

The meeting was adjourned at noon so Board members could proceed to the Volunteer Workshop.