2014 STATE FUNDS
ANNUAL CONFERENCE

National Challenges,
State Fund Strategies

APRIL 27–29, 2014
Doubletree by Hilton Hotel
Chicago O’Hare Airport
CIC is grateful to TIAA-CREF and UPS for long-term and generous support.
National Challenges, State Fund Strategies

In a changing national environment for higher education, State Funds and their member colleges continue to rethink strategies and to find new ways to make their case to the public. While seeking to increase support of member colleges from the corporate and foundation sectors, State Funds also are looking for innovative ways to help their members and to enhance public awareness of the importance of traditional residential liberal arts colleges and universities. To help State Funds address these critical issues, this year’s State Funds Annual Conference will focus on “National Challenges, State Fund Strategies.”

A full range of programming includes plenary sessions, panel presentations, roundtable discussions, opportunities for sharing best practices, and workshops on topics of importance to State Fund executives and staff. A centerpiece of the conference will be a special workshop on engaging State Funds in CIC’s national campaign, “Securing America’s Future: The Power of Liberal Arts Education.” In addition, four leadership development sessions will focus on core issues of communications and marketing, scholarship fundraising, legal issues for nonprofits, and board relations. The conference also will include a discussion with college presidents on an emerging top priority—expanding career connections for students—with consideration of how our consortia can be instrumental in helping member colleges address this need.

The conference opens with a reception on Sunday, April 27, at 6:00 p.m. CDT. Monday begins with a breakfast keynote address by Georgia Nugent, CIC senior fellow and president emerita of Kenyon College, and will include a strong lineup of morning and afternoon program sessions. That evening features the Awards Dinner where the Charles W.L. Foreman Award will be presented. On Tuesday, two nationally known speakers will give morning presentations, to be followed by a special closing luncheon program that includes a networking roundtable discussion of program ideas for “making the case” more effectively to the public.

Welcome to the 2014 CIC State Funds Annual Conference!
SUNDAY, APRIL 27

4:00–5:00 p.m. FIHE Advisory Council Meeting
Artistry

6:00–8:00 p.m. Opening Reception
Gibsons Steakhouse
Welcoming Remarks: Steven Bahls, President, Augustana College (IL)

MONDAY, APRIL 28

8:00–9:00 a.m. Breakfast Program: “The Value of the Liberal Arts”
Mister Lincoln

Setting the theme for the conference, a respected leader in higher education will speak on the value of the liberal arts and independent colleges and universities. As leader for CIC’s national campaign, “Securing America’s Future: The Power of Liberal Arts Education,” Georgia Nugent will discuss the pressing need to make the case even more effectively now as member colleges address an array of challenges in public perceptions of private, nonprofit higher education.

S. Georgia Nugent, CIC senior fellow, was named president emerita of Kenyon College in recognition of her distinguished leadership of that institution from 2003 to 2013. Prior to joining Kenyon, she had served as dean of the Harold W. McGraw, Jr. Center for Teaching and Learning at Princeton University and as professor of classics at Brown University. Nugent is a past chair of the CIC Board of Directors.

Chair: MaryAlice Breuninger, Development Officer, Independent College Fund of New Jersey
**State-Based Strategies in the National Campaign:**

“Securing America’s Future: The Power of Liberal Arts Education”

CIC’s national campaign has ambitious goals: changing the public perception of the value and effectiveness of a liberal arts education and raising positive public awareness of the role of private, nonprofit colleges and universities in preparing students to succeed in their careers and become active and engaged citizens. As colleges are looking to CIC and the State Funds to help make this case widely and effectively, it is important that strategies, tactics, and messages be aligned for maximum impact. In this session, campaign leaders will share background on the campaign action plan and will engage state executives in a discussion of strategies that they can adopt (or adapt) and implement productively in their respective states.

**Richard Ekman,** President, CIC  
**Georgia Nugent,** Senior Fellow, CIC  
**Laura Wilcox,** Vice President for Communications, CIC  
Chair: **Tom Morris**, President, Virginia Foundation for Independent Colleges

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**10:00 a.m.–2:00 p.m. Spouses Program**

*Meet in hotel lobby.*  
Spouses depart for a guided tour of the Frank Lloyd Wright Home and Studio, listed on the National Register of Historic Places, and now a National Historic Landmark. It has been restored to its appearance in 1909, the last year the renowned architect lived there. Transportation and lunch will be provided.

**Tina Egge,** Program Convener

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**10:45–11:45 a.m. Leadership Topic I: Opening Doors and Making the Case:**

**Signature III**

Engaging Your Board Members in Fundraising

State Funds, colleges, and other nonprofits with stellar records of success in increasing gifts, sponsorships, and public support have one thing in common: a board of trustees that is fully engaged in both fundraising and friendraising. A noted national consultant with experience in working with State Funds and colleges will join us to share ideas and lead a discussion on current best practices in mobilizing a board to be supportive of an organization’s mission.
Doug Mason is a partner in the advancement consulting firm of Gonser Gerber LLP. Since its founding in 1950, Gonser Gerber LLP has helped more than 650 educational and charitable organizations nationwide as consultants in advancement, public relations, and board development. He has been with the firm since 1992, serving clients representing a variety of charitable organizations across the country, including colleges and universities. He is a frequent speaker and lectures nationally on building strong advancement programs. Before joining Gonser Gerber LLP, Mason had ten years of “hands-on” experience as vice president for advancement at his alma mater, Wartburg College, and while there was active in the Iowa College Foundation.

Chair: Anne Cassidy, Vice President for Advancement Services, Independent Colleges of Washington

Noon–1:15 p.m.

Luncheon Program: Opportunities for the First-Generation Student

Mister Lincoln

Frank Romeo serves as vice president for the UPS Foundation and is responsible for the operations and management of its global philanthropic and corporate relations programs. He has nearly 40 years of experience with UPS, including 11 years in UPS’s international operations and seven years as head of UPS’s global Employee Relations Group. In 2012, he was named vice president of the UPS Foundation. Joining us to discuss the UPS Foundation’s long partnership with the State Funds in advancing the Foundation’s commitment to expanding college access and success for first-generation students, Romeo is particularly proud that CIC’s UPS Scholarship Program has helped to make a private college education possible for more than 18,000 students from underserved populations.

Chair: James Johnson, President, Nebraska Independent College Foundation
1:30–2:45 p.m.  
**Leadership Topic II: Best Practices in Scholarship Fundraising**  

In recent years, raising funds for student scholarships has become the most common emphasis in the development programs of the network of State Funds. Some key questions have been asked by members: Is the process for raising scholarships random across the network or are there similarities in how the states raise the money? What strategies are used? Which is the most effective approach? The session’s speaker, a veteran state executive, will answer these and related questions—and identify “best practices”—using the informative results of the survey of State Funds he conducted recently.  

*Jack Jones*, President, Iowa College Foundation  
Chair: *Brent Wilder*, Vice President, Oregon Alliance of Independent Colleges and Universities

3:00–4:00 p.m.  
**An Emerging Presidential Priority: Increasing Internship and Career Connections for College Students**  

With widespread public skepticism about the employability of liberal arts graduates and increasing pressure from parents who want assurance that their sons and daughters will obtain meaningful employment after graduation, colleges and universities are doing more to enhance placement programs, expand internship opportunities, and make connections with corporate recruiters. Two veteran college presidents will provide background on this critical issue and will lead a discussion of how State Funds—with existing connections to the corporate world—can provide leadership in helping their member colleges address this priority.  

*Kenneth Garren*, President, Lynchburg College  
*Jack Ohle*, President, Gustavus Adolphus College  
Chair: *Robert Bartlett*, President, Michigan Colleges Alliance

4:15–5:15 p.m.  
**Addressing the Affordability Question: A Video Solution**  

With the “affordability” of private colleges a hot topic in the media, and an issue of particular concern to students with demonstrated need, the Minnesota Private College Fund (MPCF) decided to mount a public campaign to address the issue head-on. MPCF developed a made-for-television video to be used statewide, with additional disc formats for smaller groups or
for use on individual computers. In recognition of the increasing diversity in
the population, the program has versions in three languages. This session will
provide background on the program, show clips from the videos, and discuss
their impact.

_Sunny Kase_, Director of Community Initiative, Minnesota Private College
Fund

_John Manning_, Director of Marketing and Communications, Minnesota
Private College Fund

Chair: _Susanna Baxter_, President, Georgia Independent College Association

6:10 p.m.

**Meet in Hotel Lobby to Depart for Awards Dinner**

6:30–8:45 p.m.  

**Reception and Awards Dinner**  

_Nick’s Fish Market_

While the fresh seafood delights of the renowned dinner venue will be
memorable, the highlight of the Awards Dinner will be the presentation
of the State Funds’ top award, the Charles W.L. Foreman Award, which
recognizes a college president or corporate trustee who has demonstrated an
outstanding record of service that truly distinguishes the recipient from his or
her peers in support of the mission and work of the State Funds.

The 2014 recipient of the Foreman Award is _Jack Ohle_,
president of Gustavus Adolphus College. Prior to assuming
the presidency of Gustavus in 2008, Ohle had been
president of Wartburg College for ten years and had earlier
served two institutions as vice president for advancement:
Drake University and Nebraska Wesleyan University. At
each institution, Ohle had a leadership role with the affiliated State Funds:
the Nebraska Independent College Foundation, the Iowa College Foundation,
and the Minnesota Private College Fund. In addition, Ohle served on the
board of the Foundation for Independent Higher Education, which merged
into CIC in 2010, and he assisted with the transition by serving a three-year
term on CIC’s FIHE Advisory Council.
8:00–9:00 a.m. **Breakfast Program: Networking and Updates**

*Medallion*

Presiding: **Hope Williams**, President, North Carolina Independent Colleges and Universities

**State Funds Overview**

The program will provide an update on developments in the national association, with a report on the member services, programs, and grant cycles for the coming year, including the UPS Scholarship Program.

**Ned Moore**, Executive Director, FIHE, and Vice President, CIC

**A President’s Perspective**

The discussion will provide background and insights on a key issue facing our colleges—the U.S. Department of Education’s proposed rating system for colleges, which could have major negative ramifications for our colleges and students.

**Kenneth Garren**, President, Lynchburg College, and Member, FIHE Advisory Council

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9:15–10:15 a.m. **Leadership Topic III: Legal Guidance for State Fund Members**

*Signature III*

What do state executives need to know about recent trends in legal issues affecting nonprofits—and about legal issues specific to State Funds, such as awarding scholarships and administering a scholarship program? An experienced attorney who specializes in nonprofit issues will present an overview of these and related issues, with plenty of time for Q&A and discussion.

**Edward “Ned” Segelken** has spent his entire professional career at the law firm of Porter Wright Morris & Arthur LLP in Columbus, Ohio, where he is now a partner. He graduated from Wabash College and received his law degree from the University of Michigan. For the firm, Segelken has handled trust and estate administration and business succession matters, and he is particularly versed in planned charitable giving and in matters related to nonprofit and tax-exempt organizations. He has been listed in *The Best Lawyers in America* and is recognized by *Ohio Super Lawyers*.

Chair: **Gordon Brollier**, President, Ohio Foundation of Independent Colleges
Leadership Topic IV: Building a More Effective Communications Strategy

“Making the case”—creating the right messages, identifying target audiences, and using the right media to get the messages out—is a key issue that needs to be carefully addressed to develop an effective communications strategy. A veteran of national communications and marketing campaigns, our speaker will provide insights, background, and professional advice on ways State Funds can strengthen their communications programs to support the work of their consortia and of their member colleges.

Joe Slay, an inductee of the Virginia Communications Hall of Fame, has provided communications counsel for corporations, nonprofits, numerous colleges and universities, as well as for the Virginia Foundation for Independent Colleges. He began his career in public relations and marketing in 1982, following seven years as a journalist in western Canada and the United States. He joined the Martin Agency (home of the GEICO Gecko and UPS's “What Can Brown Do for You?” campaigns) where he created and managed its award-winning public relations division for 26 years. More recently, his teams at five-year-old Slay Communications LLP have, among other projects, generated more than 6 million views for a client’s YouTube video and more than 300,000 fans for a client’s Facebook page. The recipient of the Thomas Jefferson Award for Public Relations in 1995, Slay is a graduate of Washington and Lee University.

Chair: Richard Ludwick, President, Independent Colleges of Indiana

Luncheon—Network Roundtable Discussion

Making a Statement/Making the Case: Bold Approaches to Building Awareness and Support of Our Colleges

An increasing number of State Funds have discovered an effective way to increase the visibility, understanding, and support of member colleges among civic, legislative, and philanthropic leaders. These State Funds are “making the case” by hosting a major annual event bringing together trustees, corporate leaders, donors, legislators, college presidents, and foundation executives—and demonstrating the quality of their colleges by honoring distinguished faculty, outstanding students, and notable alumni. Colleagues who have an annual event will provide summaries of their formats and
illustrate the return on investment for others to consider and discuss during this roundtable discussion.

Gerry Bellotti, Vice President, Independent College Fund of New Jersey  
Gordon Brollier, President, Ohio Foundation of Independent Colleges  
Rex Nelson, President, Arkansas’ Independent Colleges and Universities  
Eddie Shannon, Executive Vice President, South Carolina Independent Colleges and Universities  

Chair: Jerry Fuller, Executive Director, Associated Colleges of Illinois

1:15 p.m.  
Conference Concludes
Doubletree by Hilton Hotel Chicago O’Hare Airport
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SAVE THE DATES!

2015 State Funds Annual Conference • April 26–28, 2015 • Nashville, TN