

## State of CASE District V Report for 2005-2006

Dear CASE V Colleagues,

The Great Lakes District of the Council for the Advancement and Support of Education continues to be a strong operation as evidenced by a solid financial standing, planning and executing the largest CASE conference in the country and the continued expansion of services to our members.

The leadership provided by my predecessors along with the dedicated work of hundreds of volunteers are responsible for this success. I would like to extend my sincere appreciation to everyone who has helped build CASE V into the vital professional organization it is today.

There is more that can be done, however. Those of you who participated in the membership survey conducted last year provided us with some insight on how we might continue to enhance services to our members. We take that input seriously, and have responded with several initiatives, including:

- Creation of one-day, mini-conferences called CASE V by Demand. Hosted by district institutions, these one-day workshops provide low-cost professional development opportunities focusing on a single discipline or topic. The goal is to provide a more intimate setting for networking and exploration of current issues we face in advancement. The first event was conducted in November in collaboration with the fall meeting of I-CASE, an advancement group within Indiana. Two more sessions are planned in the spring. Jeff Liebermann is spearheading this effort for us.
- Upgrading of the CASE V district newsletter, advance. As you probably noticed, our newsletter has been upgraded to four-color and is being printed on higher quality stock. Despite the growth in electronic delivery of news and information, our members have told us they still like receiving a printed newsletter. Thanks to the leadership of Editor Brad Quarberg, advance includes meaningful content that extends beyond district news.
- Brad also helped launch e-advance this year, a monthly electronic newsletter going to all CASE V members. This compilation of reminders and announcements is helping us meet our goal of improving communication about CASE V activities. Communications and Operations Chair Al Friedman has assisted with developing our communications tools and calendar.
- Our Web site has developed into a model for CASE districts across the country under the able direction of Lynsey Struthers. Lynsey is leaving the district board and her role as CASE V Web manager as she pursues a new opportunity with one of our vendors. We owe her a mountain of gratitude for her work on the public site as well as building a behind-the-scenes system for use by our conference committee. We wish her the best in her new career.
- Enhancing the relationship between ASAP V and CASE V. Student advancement leaders are future advancement professionals, and we can do a better job of connecting with them while still in college to encourage and inspire them to pursue careers in advancement. Ralph Amos and Reed Rice, our ASAP V representative, have been leading this effort.
- The Pride of CASE V district awards program continues to grow as we celebrate its third year. We have improved some of the mechanics of the program and continue to refine its operation. Congratulations to all of the award winners for your outstanding work in advancement!

CASE International has also had another successful year with record institutional membership, new opportunities for international growth, and a healthy financial foundation. Highlights for the 2005-2006 year for CASE include:

- Conducted first comprehensive conference for advancement professionals in the Asia-Pacific region, drawing 440 delegates from 30 countries.
- Assisted institutions and advancement professionals affected by Hurricanes Katrina and Rita with a variety of initiatives including crisis management tools and a job service for displaced advancement officers.
- Launched new CASE Principles of Practice for fund-raisers and editors.
- Partnered with the American Council on Education and others on Solutions for our Future, a U.S. initiative to create awareness about the roles colleges and universities play in solving societal needs.
- Made significant progress in an initiative sponsored by the Carnegie Corporation to help six universities in Africa build advancement programs and secured a \$300,000 grant to continue the effort.
- Launched e-guides for independent schools as part of our online Advancement Essentials series.
- Introduced the CASE Management Checklist for Development to help development managers conduct internal self-assessments of programs.
- Launched first electronic election of trustees to the CASE board.

It has been an honor to serve as your chair this past year, and I look forward to serving you in this capacity through 2007. Thank you for your support of CASE V and our district activities. Please let us know how we can continue to assist you in the coming year.

Sincerely,  
Teresa Exline  
CASE V District Chair

## CASE District V Nominating Committee Report

*The slate of nominees for 2007 CASE  
District V Board of Directors includes:*

### Secretary 2006-2007

Dawn Dempsey  
Kendall College of Art  
and Design of Ferris State  
University



Dempsey

### Treasurer 2006-2007

Caryn Schultz-Korman  
Rosalind Franklin  
University of Medicine  
and Science



Schultz-Korman

### First Two-Year Term 2006-2007

Edwardo Manuel  
University of Wisconsin-  
Madison



Manuel

Jennifer Heisey  
University of Cincinnati  
Alumni Association



Heisey

Carla S. Willis  
Ohio Northern University,  
College of Law



Willis

Submitted by members of the Nominating  
Committee:

Mike Ziemianski, chair  
David Bahlmann  
Carmela Kranz  
Kate Loftus  
Matt TerMolen

## MINUTES 2005 CASE V ANNUAL MEETING December 11, 2005 Chicago Sheraton Hotel and Towers

District Chair Mike Ziemianski called the 2005 Annual Meeting to order and welcomed all conference registrants. He recognized the CASE District V Board of Directors and thanked them for their hard work. He welcomed four special guests: Julian Bivens, chair-elect of the CASE International Board of Trustees and assistant vice president for advancement services at the University of Virginia; John Lippincott, president of CASE International; Joseph McQuay, director of external communications at Barry University in District III and this year's CASE Exchange Representative to our district; and Dr. Judson Jeffries from Purdue University, the District V Clarence Jupiter Fellow.

The minutes of the 2004 Annual Meeting were approved as presented. The treasurer's report was approved as presented in the annual report.

Chair Ziemianski presented the report of the 2005 Nominating Committee. The slate of candidates presented for election were: Chair-Elect – Barbara Todd, Illinois State University; Director-At-Large for his second two-year term – John Hobson, Indiana University; Director-At-Large for their first two-year terms, Peter Anagnostos, Hawken School and Sarah Panetta, Mayo Clinic. There were no nominations from the floor. The slate was approved as presented. 2004-05 Chair-Elect Teresa Exline, Indiana State University, will become Chair at the close of this year's conference.

Recipients of the CASE V Student Scholarships — Calvin Wysocki, University of Wisconsin-Madison; David Wenzel, University of Cincinnati; Heather Nichelle Charboneau, Earlham College; Rachel Gonnering, St. Norbert College; Thomas Sparrenberger, Indiana University-Bloomington; and Courtney Tarter, Northwestern College — were introduced and welcomed to stage.

Winners of the CASE V Newcomers Fellowships awarded to those new to the field of advancement were then introduced. They were: Eric Gentry, Purdue University, recipient of the Vaughn Dann Fellowship; Jenell Anderson, Millikin University, recipient of the Ray Willemain Fellowship; and Elizabeth Brendel, Viterbo University; Stacy Poca, Bowling Green State University; Stephen Smith, University of Notre Dame; Leslie Renner, Butler University; Bonnie McArthur, Kettering University and Ben Strant, University of Wisconsin-Whitewater.

Chair Ziemianski acknowledged Dr. Luis M. Proenza, president of the University of Akron and the recipient of the 2005 CASE V Chief Executive Officer Leadership Award. The 2005 Committee on Opportunity and Equity Award Recipient, Lindsey Loftus from Kent State University, was also introduced.

Gene Haberman from Ashland University, the 2004 CASE V Distinguished Service Award winner, presented the 2005 award to Jennifer Hamlin-Church of Siena Heights University.

The meeting was adjourned. The video presentation *Advancement: Everything Matters!* was introduced followed by the keynote address by Rafe Esquith.

Respectfully Submitted,  
Cynthia Cashman  
Secretary

**TREASURER'S REPORT**  
**Fiscal Year 2005-06 Annual Meeting**  
**Chicago Sheraton Hotel and Towers • December 10, 2006**

CASE District V continues to operate with a philosophy of responsible fiscal management and the goal of maintaining a strong financial position. CASE V ended the 2005-06 fiscal year with assets totaling \$652,836.00. During the 2005-06 fiscal year, CASE V posted a net gain of \$54,728.87 as a result of growth in the market value of the District's investments as well as increased revenue generated by a greater number of attendees at the 2005 conference than was budgeted.

Because CASE V's portion of the District Pooled Investment Fund remained greater than \$250,000 at the end of the 2005-06 fiscal year, the CASE V Board of Directors implemented its policy of drawing 5 percent of the fund in 2006-07. These funds were used to help keep the registration fees for the 2006 CASE V Conference as low as possible for members and to enhance conference programming and other services provided by the district.

I want to thank the members of the Financial Review Committee of the Board of Directors for their work in reviewing District V's fiscal policy and financial statements throughout the year. Their assistance is invaluable in maintaining District V's sound fiscal position.

During the past fiscal year, CASE V's checking and savings accounts were maintained at National City Bank. Short-term investments were in two CD accounts at Old National Bank.

CASE V's long-term investments are part of a pooled investment fund with other CASE districts that is managed by Fund Evaluation Group, located in Cincinnati, through the CASE office in Washington, D.C. The investment policy for these funds is determined by the CASE District Chairs Council. CASE in

Washington files all required IRS reports and oversees an annual audit.

Shown on this page are the CASE District V Financial Summary and Fund Balance for July 1, 2005, through June 30, 2006. Financial statements for the 2005-06 fiscal year are available for review at the Hospitality Desk, throughout the conference.

Respectfully submitted,  
 Larry G. Anderson  
 CASE V Treasurer

**CASE District V FINANCIAL SUMMARY**  
**July 1, 2005 – June 30, 2006**

**REVENUE**

Conference Registration Fees	\$288,042.26
Pre-Conference Registration Fees	\$18,300.00
Exhibitor/Consultant Registration Fees	\$71,420.00
Sponsorships	\$39,414.76
Restricted Sponsorships	\$15,285.24
Program Ads	\$9,600.00
Special Event Fees	\$12,514.00
Pride of CASE V Awards Entry Fees	\$17,750.00
Miscellaneous	\$1,199.00
Interest Earnings	\$32,285.88
Investment Gains/Losses	\$18,714.00
<b>TOTAL REVENUE</b>	<b>\$524,525.14</b>

**EXPENSES**

*Conference Related Expenses*

Conference Planning and Operations	\$53,820.92
Registration Expense	\$6,413.62
Food and Beverage (Breaks, Breakfasts, Banquet)	\$91,843.54
Other Special Events	\$11,279.86
Announcements & Programs	\$17,998.21
Track Programming	\$9,753.85
Pre-Conference Workshops	\$5,272.00
Newcomer's Fellowship	\$3,200.00
Exhibitors/Consultants	\$29,796.50
On-Site Operations	\$100,252.09
Open & Close	\$20,999.12
Restricted Sponsorships Conference Additions	\$15,285.24
Credit Card Fees	\$11,099.97
<b>Total Conference Related Expenses</b>	<b>\$377,014.92</b>

*District Operating Expenses*

District Planning and Operations	\$57,471.34
Financial Review Committee	\$2,335.49
Communications/Operations Committee	\$23,418.01
Membership Committee	\$0.00
Prof. Development Committee	\$3,267.45
Awards and Recognition Committee	\$4,544.41
CASE National Expenses	\$1,744.65
<b>Total District Operating Expenses</b>	<b>\$92,781.35</b>

**TOTAL EXPENDITURES** **\$469,796.27**

**EXCESS REVENUE OVER EXPENDITURES** **\$54,728.87**

**CASE District V**  
**FINANCIAL SUMMARY**  
**7-1-05 thru 06-30-06**

**Assets**

Checking	
Nat City Checking	\$8,126.02
Prepaid Expenses	\$12,004.34
Investments	
Old National Bank CD	\$52,680.00
District Investment Fund	\$517,384.00
Nat City Savings	\$10,702.67
CD #2 Old National Bank	\$51,938.97

**TOTAL ASSETS** **\$652,836.00**

**Liabilities**

Current Liabilities	
Deferred Revenue	\$8,638.79
<b>TOTAL CURRENT LIABILITIES</b>	<b>\$8,638.79</b>

**Equity**

Members' Equity	
Fund Balance	\$589,468.34
Current Income	\$54,728.87

**TOTAL LIABILITIES & EQUITY** **\$652,836.00**



Amos



Anagnostos



Anderson



Cashman



Chambers



Crossley



Exline



Friedman



Glazer



Hobson



Liebermann



McGlinch



Miller



Panetta



Quarberg



Rice



Stringer



Struthers



Todd



VanScoy



Williams



Worley



Ziemianski

**Ralph Amos**

*ASAP Advocate*  
Assistant Vice President-Alumni Relations  
Executive Director, The Ohio University  
Alumni Association

**Peter K. Anagnostos**

*Director at Large*  
Director of Development  
Hawken School

**Larry Anderson**

*Treasurer*  
Communications Director  
DePauw University

**Cynthia Cashman**

*Secretary*  
Chief Development Officer  
University of Minnesota

**Brett Chambers**

*District V Liaison*  
Executive Director of Volunteer Relations  
Council for Advancement and Support of  
Education (CASE)

**Linda S. Crossley**

*Archivist*  
Vice President Communications and  
Editor-in-Chief  
The Ohio State University Alumni  
Association Inc.

**Teresa Exline**

*Chair*  
Assistant to the President for Strategic  
Communication and University Spokesperson  
Indiana State University

**Al Friedman**

*Operations Committee Chair*  
Associate Director University Communications  
University of Wisconsin-Madison

**Frank C. Glazer**

*Director at Large*  
Vice President for Advancement  
Franciscan University of Steubenville

**John Hobson**

*Director at Large*  
Senior Vice President and Chief Operating  
Officer  
Indiana University Alumni Association

**Jeff Liebermann**

*Chair, Mini Conference program*  
Senior Director of Development  
College of Liberal Arts and Sciences  
University of Iowa Foundation

**Catherine McGlinch**

*2006 Conference Chair*  
Executive Director  
Minnesota State Colleges and Universities  
Foundation

**Randall Miller**

*District V Trustee*  
President  
Lake Michigan College

**Sarah Panetta**

*Director at Large*  
Associate Chair, Department of Development  
Mayo Clinic

**Brad Quarberg**

*advance Editor*  
Associate Director, University  
Relations/Advancement & External Relations  
University of Wisconsin-La Crosse

**Reid Rice**

*ASAP CASE V Rep*  
The Ohio State University

**Cheryl Stringer**

*Director at Large/COE Chair*  
Regional Director of Volunteer Management  
Penn State University

**Lynsey Struthers**

*CASE V Web Manager*  
Director of Interactive Marketing  
The Lawlor Group Inc.

**Barbara Todd**

*Chair Elect*  
Executive Director of Internal Campaigns  
Illinois State University

**Jacob VanScoy**

*CASE V Web Manager*  
Web Designer/Editor  
St. Olaf College

**Keith A. Williams**

*Director at Large/Membership*  
Executive Director  
Michigan State University Alumni Association

**Mike Worley**

*2006 Conference Program Chair*  
Major Gifts Officer  
East Carolina University

**Mike Ziemianski**

*Past Chair*  
Director of Development  
Saint Meinrad School of Theology



McGlinch



Worley

**Catherine McGlinch**  
*Conference Chair*  
 Executive Director  
 Minnesota State Colleges and Universities  
 Foundation

**Mike Worley**  
*Program Chair*  
 Major Gifts Officer  
 East Carolina University



Aliesch



Bull

**Florence Aliesch**  
*Publications*  
 Director of Publications  
 University of Wisconsin-La Crosse

**Tom Bull**  
*Local Hospitality*  
 Manager, Development and Alumni  
 Relations  
 Columbia College Chicago



Bowen



Davis

**Tyler Bowen**  
*Career Development*  
 Alumni Director  
 Southwest Minnesota State University

**Angela Davis**  
*Session Hosts/Evaluations*  
 Assistant Director, Donor Relations  
 Purdue University



Gleim



Hamlin

**Jeff Gleim**  
*Audio Visual Chair*  
 Director, Alumni Advocacy  
 The Ohio State University Alumni  
 Association Inc.

**James L. Hamlin**  
*Development Chair*  
 Executive Director of Scholarship Support  
 Washington University in St. Louis



Heisey



Hudkins

**Jennifer Heisey**  
*Newcomers/Pre-Conference (ASAP)*  
 Program Director  
 University of Cincinnati Alumni  
 Association

**Brenda K. Hudkins**  
*Web Chair*  
 Assistant Director  
 Kent State University Alumni Association



Jones



Meyer

**Denise Jones**  
*Registrar*  
 Director of Web Services And Support  
 Ball State University  
 Information Technology

**Forrest Meyer**  
*Communications Co-Chair*  
 Director of Communications  
 University of Iowa Foundation



Mittelstadt



Poca

**Karen Mittelstadt**  
*Communications Co-Chair*  
 Communications Manager, Office of  
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 University of Wisconsin-Madison

**Stacy Poca**  
*Food, Beverage and Banquet*  
 Coordinator, Donor Relations &  
 Communications, Office of Development  
 Bowling Green State University



Quarberg



Reaume

**Brad Quarberg**  
*Marketing Chair/advance Editor*  
 Associate Director, University  
 Relations/Advancement & External Relations  
 University of Wisconsin-La Crosse

**Vicki Reaume**  
*Alumni Co-Chair*  
 Executive Director of Alumni Relations  
 Eastern Michigan University



Rent



Schultz-Korman

**J. Allan Rent**  
*Sponsorships & Advertising*  
 Director of University Marketing  
 Ball State University

**Caryn A. Schultz-Korman**  
*Resource Center*  
 Director of Alumni Affairs  
 Rosalind Franklin University of Medicine  
 & Science



Seibring



Shroka

**Steve Seibring**  
*Alumni Co-Chair*  
 Associate Vice President for Advancement  
 Illinois Wesleyan University

**Julie Byrne Shroka**  
*2-Year/Independent Schools Chair*  
 Director, Alumni Relations & Special  
 Events  
 College of Lake County



Spiker



Stephany

**William J. Spiker**  
*Executives in Management Chair*  
 Vice President, University Advancement  
 Cleveland State University

**Lynley Stephany**  
*Floor Manager*  
 Director of Development  
 DePaul University



Struthers



Trench

**Lynsey Struthers**  
*CASE V Web Manager*  
 Director of Interactive Marketing  
 The Lawlor Group Inc.

**Michael Trench**  
*Roundtables Chair*  
 Chief Development Officer  
 College of DuPage