

## Finding the future

### CASE V takes on strategic planning.

**"**If you don't know where you're going, you're never going to get there." That's trite, but true.

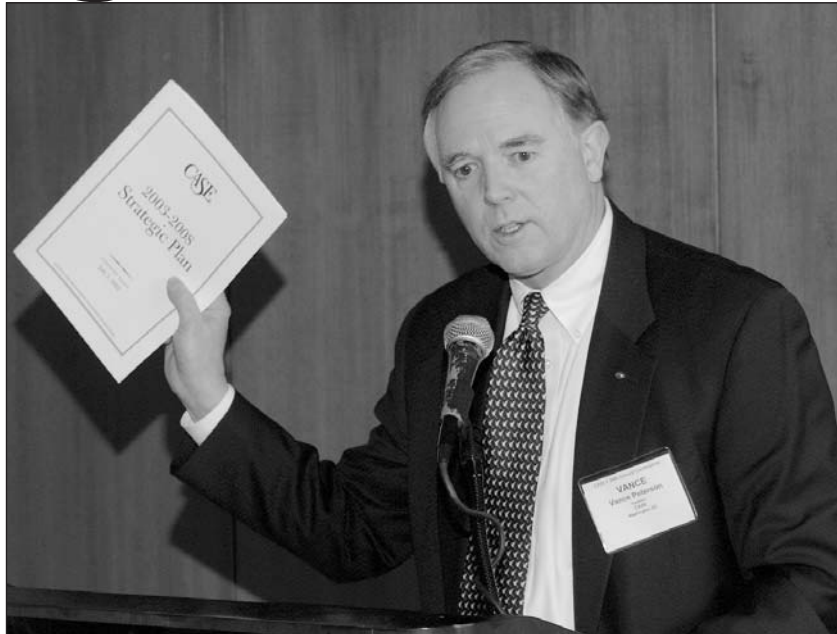
And, it applies to CASE V.

As CASE International has been re-evaluating and refining its mission, the CASE V Board of Directors has followed suit. CASE V leaders have been taking a strategic look at who is in the district, what it does for membership, and how well it does it.

"With ever-tightening financial resources, expanding options for professional development services, and the changing demands on the advancement professions, it's more important than ever that CASE V has a clearly defined role and vision," says Board Chair Bruce Loessin. "If we intend to remain relevant to the district, we have to take a strategic approach to our business."

### Stop. Look. Listen.

Any strategic planning process begins with looking and listening. In addition to many hours the board and



CASE International President Vance Peterson discusses the organization's strategic plan. CASE V directors has followed CASE International's lead and taken a strategic look at who is in the district, what it does for membership, and how well it does it.

### Making the CASE

conference planning committees have spent "soul searching" and defining a mission, vision, and values, they have been soliciting the perspective and wisdom of constituents. During her tenure as board chair, Lynn Carver initiated the process of evaluating how well the district is currently serving the professional development needs of advancement

See Strategic Plan page 3

### CASE V Strategic Plan highlights

- CASE V goals come from CASE International's four primary goals. Three of them are suited to CASE V: strengthen member services; further the profession; and lead change in advancement.
- The plan contains Strategic Imperatives that define priorities for the future and associated action steps.
- An important component: taking advantage of the expertise and the potential of the district professionals.

## You'll get your money's worth (again)

### Conference to offer stellar sessions; registration kept at \$195.

**R**emember how you took your mom and dad for granted? Or, how you rushed off to work, oblivious to spring flowers or fall colors?

The same could be said about CASE V's annual conference. We sometimes take its year-in, year-out top-notch quality for granted. There's always dynamic presentations, ample networking, and an array of resources — all at an exceptional value. This year will be no different. Issues and challenges change every year, but CASE V is the constant you can rely on for value, quality and collegiality.

A 25-member conference committee of your colleagues is planning around 90 sessions covering issues that

matter in today's challenging advancement climate. There will be opening and closing sessions featuring keynote presentations. And, a large sampling of vendors are already planning to fill the ever-popular Resource Center. Don't forget the roundtables — around 70 — and prime networking opportunities.



More details, page 4

Start saving your professional development dollars now! We realize current economic challenges may limit professional development for some this year. But, there's no better time to stay on the cutting edge of the advancement field. So, save for the CASE V conference, a proven, traditional resource. We offer the biggest bang for your professional development buck — an array of programming, not to mention the food, refreshments breaks, camaraderie and more...all for \$195!

Watch your mail for details, or keep an eye on the CASE V Web site — [www.casefive.org](http://www.casefive.org). We'll see you in Chicago this December!

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[www.casefive.org](http://www.casefive.org)

# Breaking barriers

## Jupiter Fellowship opening doors for people of color.

**C**onfidence and the strong network created from being a CASE V Jupiter Fellow has helped Tysus Jackson receive the talent and intellect to achieve her career aspirations.

Beginning her career in development at the Indiana University Foundation as a graduate intern while pursuing a master's of public administration, Jackson knew this was the career for her. During two years there, she used her experience to complement her graduate research. She created a concentration in philanthropy with non-profit management. After graduation and a year of working with the mayor of Fort Wayne, Ind., she realized she wanted to be back in development.

It was Jackson's mentor, Charlie Nelms, vice president at Indiana University, who introduced her to the Jupiter Fellowship. "I was familiar with the fellowship and knew it would be a great honor to be selected as a fellow," says Jackson. She was assigned at Wabash College (Crawfordsville, Ind.). Jackson considered this to be a great privilege with Wabash's impressive fund-raising background. She cherished the ability to broaden her knowledge of advancement at a small, selective liberal arts college.

### Access to CASE V professionals

The CASE Jupiter Fellowship program, designed to get people of color interested in working in the advancement field, has consistently helped to increase Jackson's picture

of advancement. Jackson's mentor at Wabash, Mark Jones, gave her numerous opportunities to put her newfound knowledge to the test. Her hands-on experience has included the national alumni board, the board of trustee's sub-

### What is the Jupiter Fellowship Program?

The Clarence J. Jupiter Fellowship Program in Institutional Advancement is designed to attract minority professionals to the field of institutional advancement (alumni relations, communications, fund raising) at college universities and independent schools.

The fellowship provides participants the opportunity to enter institutional advancement through a six-to-nine month "hands-on" work experience. It offers the chance to work directly with some of the finest senior professionals in the field on the campus of a partner host institution – an independent school, college or university

CASE V typically hosts two Jupiter Fellows each year. For an application or additional information about the program, contact Elisse Wright, special assistant to the president for diversity initiatives, at [wright@case.org](mailto:wright@case.org) or 202.478.5654.

committee, and executive campaign cabinet meetings. "District V has provided access to wonderful professionals who are always willing to take time and mentor," says Jackson. "I feel very fortunate to have my fellowship at Wabash College."

As a member of the fellowship program, Jackson has been able to gain skills it usually takes years to attain. "I have learned how to utilize volunteers effectively and conversely to support and motivate them," notes Jackson.

Increasing her knowledge of public affairs, advancement services, diverse constituent groups, working with other campus departments and management skills helped Jackson to coordinate a building dedication that encompassed all of these skills. "I have received great support from

CASE International and District V," explains Jackson. "Wow! District V is a superb group of professionals. I have found great assistance and mentoring from them at every turn."

### Open your eyes

Not only has the fellowship given Jackson skills, it has also opened her eyes to a variety of career opportunities. With advancement and management skills, Jackson aspires to become a chief development officer. "It was Mark Jones



Mark Jones, left, Wabash College (Crawfordsville, Ind.), presents CASE V Jupiter Fellow Tysus Jackson with a going-away gift. When Jackson completed her CASE V internship-type experience at Wabash, she was offered a job at Virginia Tech, a rival of the University of Virginia where Jones worked. CASE V typically hosts two Jupiter Fellows each year.

who opened the door for me about pursuing a chief development officer position," notes Jackson. "I really give him credit for preparing me in that direction."

She knows that there are not many people of color in the advancement profession. This number decreases even more when looking at chief advancement officers. "This certainly does not deter me from believing I have the talent and ambition to achieve my career aspirations," says Jackson. "I believe much of this confidence comes from being a CASE Jupiter Fellow and the strong network it has created for me."

And clearly, Jackson is on her way. She has been hired as director of development of multicultural affairs at Virginia Tech. "I am very excited about the opportunity but the hardest part is leaving Wabash and District V," she says. "Although I honestly feel through this fellowship that I am ready for the challenge."

*Article by Bridgett Littell, a student intern in the University of Wisconsin-La Crosse University Relations Office.*

# Board eliminates June meeting to save money

## Some budget reduction for 2003-04.

**T**he CASE V Board of Directors has voted to forgo its regular summer meeting to help save money that can be invested in conference activities. During its February meeting at the Sheraton Hotel and Towers, board members eliminated the annual June meeting in a move to save costs during tight fiscal times. Instead, selected board members will hold a teleconference call. The full board will hold its regularly-scheduled meetings in September, December and February.

In other matters, the board:

- Approved a \$345,900 budget for the district's conference and operating expenses in 2003-04. That's down slightly from the proposed \$363,250 for 2002-03, which ends June 30, 2003. The 2003-04 funding for all conference programming remained at current levels, as did funding for the Jupiter Fellowship Program. The budget for advance newsletter, which

has run under budget the past three years because more effective management reduced production and mailing costs, was cut \$7,000. And, the budget for the Web site was reduced from \$5,600 to \$1,000 because the site will now be maintained by a district volunteer.

- Approved a final draft of the district's Strategic Plan. (See cover article.)

- Heard the results of a member survey taken during the 2002 conference.

Respondents value the district's networking opportunities the most. Also, they confuse the district Web site with CASE national's site, and are unfamiliar with some CASE V programs. The findings are being addressed in the Strategic Plan.

- Thanked Linda Kettner, University of Iowa, for her service to the board as a liaison to the CASE Communications and Marketing Commission.

- Formed a task force to look at the feasibility of creating a district awards program. Board Secretary and 2002 Conference Committee Chair Teresa Exline, Indiana State University, will chair the group.

# 'It's simply strategic, my dear, Watson!'

## Strategic plan is 'good stuff.'

**T**oday, organizations focused on fulfilling their mission have a plan, or "road map," to help them through the journey. In most cases, a strategic plan.

Over the last few years, the CASE Board of Trustees and staff in Washington, D.C., have worked to develop and implement such a plan for the 24,000-member organization. The work outlined within the plan is robust and tailored to move the organization forward in dynamic ways — focusing on increased service, leadership development and programmatic initiatives.

Inspired by the work being done in Washington, CASE V's leadership is also working more strategically by developing a plan of its own, focused on the needs of district membership. From my vantage point as the District's Trustee, I view the plan as thought provoking and focused on areas important to service members within the district—it's good stuff! As the plan evolves, the CASE V Board will share it with you. (See cover article.) As you well know, member input is what will bring the document to life and help tailor it to best speak to the future aspirations and needs of CASE V.

The document's overarching goals are timely, purposeful and focused on member service and satisfaction. They are:

### 1. Strengthen Member Services

To accomplish this goal, CASE V will...

- Ensure the highest quality and impact of

existing services, based on constituent needs and interests, new and emerging technologies, and emerging markets.

- Distinguish, define, and serve the needs and interests of professionals in all areas and levels of advancement (from newcomers to CEOs)
- Consistently evaluate, enhance, and change services to remain relevant to constituents' needs and interests.

### 2. Further the Profession

To accomplish this goal, CASE V will...

- Promote, support, and celebrate diversity in the advancement profession

## I view the plan as thought provoking and focused on areas important to service members within the district—it's good stuff!

- Be considered a leader in advancement professional development
- Promote CASE membership within the Great Lakes District

### 3. Lead Change in Advancement

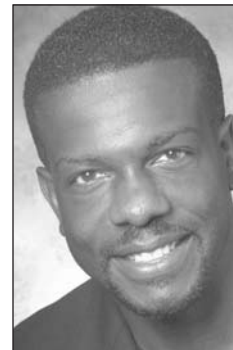
To accomplish this goal, CASE V will...

- Monitor, report on, and respond to the changing nature of advancement
- Continually assess and improve our services

The plan is strengthened through a host of imperatives that ensure the initiatives; priorities and deployment of human and other resources are effective and efficient:

- Optimize the quality and impact of existing services and programs.

- Fully understand the professional development needs and interests of advancement professionals in the district.
- Take full advantage of the expertise and resources available to us in the district, and beyond, to optimize our programs and services (both existing and new).
- Serve the optimum number of professionals in the district.
- Establish strategic relationships with CASE International to assist in the accomplishment of our mutual goals.
- Optimize the effectiveness of the Board.



Ralph Amos

I am confident that the future success of CASE V is in the capable hands of its leadership and will be well-guided by the continued focus on the new strategic plan. I encourage each of you to take part in the plan's development by reviewing drafts of the document as they are presented and by sharing your ideas with the Board and other key volunteers listed on the CASE V Web site at [www.casefive.org](http://www.casefive.org).

All of us serving CASE V wish you the best and are encouraged by your continued support. Take care.

*Ralph Amos, Ohio University, CASE V Trustee*

## Strategic Plan

From cover page

professionals, and seeking guidance on what the future should look like.

In addition to many informal conversations with colleagues and representatives of similar organizations (including other districts), a survey of 2002 conference attendees was conducted. Board members also held a focus group with membership coordinators to begin identifying their role in the district and how to involve more professionals in programming.

### So, how is CASE V doing?

The annual CASE V conference gets high marks from attendees, but district members are generally unfamiliar with the district's other services and initiatives, most of which are associated with the conference, and don't take full advantage of them. (See sidebar.)

The bottom line? The board has determined that the district's existing initiatives, particularly the annual conference, are right in line with the mission of CASE V, but are not up to their full potential in terms of serving the needs and interests of current and prospective members. So, the district's first goals are to communicate more effectively with current and prospective district members, sharpen existing services, and do what it is already doing well. After that, the district will explore new avenues for serving members, ensuring financial stability, and fulfilling its mission

### CASE V current services

CASE V offers numerous services to Great Lakes area advancement professionals. Are you familiar with them?

- Jupiter fellowships
- Student scholarships
- Senior professionals and retirees recognition
- Newcomers offerings
- District conference

CASE V offers the following communications services:

- District Web site ([www.casefive.org](http://www.casefive.org))
- Mass e-mail availability to members, membership coordinators, other constituencies
- advance newsletter

of being recognized as "the leading resource for professional development and information, the leading proponent of professional ethics and standards, and the leading advocate for diversity."

### There's work to be done

"We've just scratched the surface and we know that we have a long way to go, but I feel we're well on our way to ensuring that CASE V meets the needs and expectations of the advancement professionals in the Great Lakes district," says Loessin. "We've got a dedicated board and conference committee, and we're ready to shake things up a bit to make sure we don't get too complacent. Our Strategic Plan provides us with a very useful road map to guide our work and priorities."

Next steps are to associate board and committee responsibilities with the action steps, and establish a reasonable timetable to accomplish district goals. But, as with any Strategic Plan, it's a long-term

commitment that will grow and change along with the profession.

The district now has a better sense of where it's going. The board hopes members will be with it along the way.

## Making the CASE

Article by David Hoover. Hoover, CASE V Board Operations Committee Chair, is senior director of University Marketing Communications at The Ohio State University (Columbus).

Review the CASE V Strategic Plan at: [casefive.org/strategicplan](http://casefive.org/strategicplan). Direct comments to David Hoover, [hoover.1@osu.edu](mailto:hoover.1@osu.edu)

# ADVANCING ADVANCEMENT in challenging economic times

"The presenters, for the most part, were seasoned speakers and delivered on their themes. This was refreshing. I attended a [CASE institute] last March, and the CASE V conference was far superior in terms of quality speakers. Now, that says everything!"

—2002 CASE V conference attendee

## The top 5 reasons to attend the 2003 CASE V Conference

- 5 Chicago in December. Is there a better place and time to recharge yourself for the upcoming year?
- 4 Roundtables...more than 70 of them, in fact. You'll have the chance to discuss latest trends in advancement.
- 3 One word: "Networking." It's the second most popular benefit of the conference, right behind our top-rated sessions.
- 2 Sessions. Select from 90 of them, not to mention the special keynote presentations.
- 1 \$195\*. That's all it costs for great programming and networking — not to mention two breakfasts, four refreshments breaks and a lunch. Most conferences charge three times that amount — and we even give you breakfast, breaks and a lunch to go with it!

\*Group Early Registration Rate

"Everyone associated with CASE V was so helpful, and the information I received at the conference was invaluable. Further, the conference afforded me the occasion to make new friends and contacts — what a great networking opportunity!"

— 2002 CASE V conference newcomer



## Save the date!

CASE V 29th Annual Conference

"Advancing Advancement...in Challenging Economic Times"

Sunday-Tuesday, Dec. 14-16

Chicago Sheraton Hotel and Towers

## Retirement plans underway?

CASE V honors colleagues who have recently retired or are planning to retire during the current academic year. The only qualifications for this recognition are 10 years of service in institutional advancement and involvement in CASE. If you qualify, or know someone who does, contact CASE V Board Member Julie Campbell Lund, director of communications at the University of Minnesota's Humphrey Institute of Public Affairs, and request a nomination/application form. Applications are due Sept. 15. Reach Lund at: [jlund@hbbh.umn.edu](mailto:jlund@hbbh.umn.edu).



## An added bonus

Pre-conference Workshops are exceptional added values to all conference participants. Don't miss the chance to gain information that would cost you a lot more in a separate conference setting. Those registered for the conference can attend a pre-conference workshop for only an additional \$75. Watch for more details!

[www.casefive.org](http://www.casefive.org)

- advance back issues
- resources
- conference updates
- much more



Quarberg



Kranz



Aliesch



Boles



Cerny



Fisher



James



Loeb sack



Loftus, K.



Loftus, L.



Lorber



Marshall



McGlinch



Miller



Rent



Reynolds



Sayre



Scalzo

# 2003 Conference Committee

**Brad Quarberg**, Conference Chair  
Associate Director, University Relations  
University of Wisconsin-La Crosse

**Carmela Kranz**, Program Chair  
Director of Development  
School of Public Health, Minnesota Medical Foundation

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

**Tiffany Boles**, Audio-Visual  
Asst. Director, Alumni Outreach & Engagement  
Ohio University

**Kirk Cerny**, Alumni Co-Chair  
Sr. Vice President for Membership Services  
Kansas Alumni Association

**Carleen Fisher**, Local Hospitality  
Development Officer  
Beloit College

**Patricia James**, Resource Center  
Associate Director of Development  
Gault Alumni Center

**Joyce Loeb sack**, Career Center  
Director of Marketing Communications  
Ursuline College

**Kate Canfield Loftus**, 2-Year/Independent Schools  
Director of Advancement, College of Letters and Sciences  
UW-Whitewater

**Lindsey H. Loftus**, Alumni Co-Chair  
Executive Director  
Kent State University Alumni Assoc.  
Kent State University

**Jeff Lorber**, Roundtables  
Vice Chancellor for University Advancement  
Indiana University Northwest

**Mark Marshall**, Development Co-Chair  
Vice President  
Development and Alumni Relations  
William Mitchell College of Law

**Catherine McGlinch**, Registrar  
Executive Director of Leadership Giving  
College of St. Benedict

**Randall Miller**, Senior Pro  
Executive Vice Chancellor  
Wayne County Community College

**J. Allan Rent**, Sponsorships & Advertising  
Director of University Marketing  
Ball State University  
Office of Vice President for University Advancement

**Diane Reynolds**, Development Co-Chair  
Director of Annual Giving  
University of Chicago

**Kathryn Sayre**, Operations Coordinator  
Director of Marketing  
University of Iowa Alumni Association

**Teresa Scalzo**, Communications Co-Chair  
Director of Publications  
Editor, Carleton College Voice  
Carleton College

**Janie Spencer**, Food, Beverage & Banquet  
Executive Director  
UW-La Crosse Alumni Association  
University of Wisconsin-La Crosse

**Jeffrey T. Spoeri**, Session Hosts/Evaluations  
Director of Development, College of Education  
Michigan State University

**Lynsey Struthers**, District Web Manager  
Web Manager  
St. Olaf College

**Matthew TerMolen**, Management Chair  
Associate Vice President for University Development  
Northwestern University

**Barbara Todd**, Newcomers/Pre-Conference  
Director of Alumni Services  
Illinois State University

**Laura Weber**, Communications Co-Chair  
Communications Director  
General College  
University of Minnesota-Twin Cities

**Mike Worley**, Floor Manager  
Assoc. Executive Director for Outreach  
Ohio University



**Spencer**



**Spoeri**



**Struthers**



**TerMolen**



**Todd**



**Weber**



**Worley**



**Loessin**



**Mock**

# 2003 Board of Directors

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**David Bahlman**, Commission Liaison-Philanthropy  
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Membership, Senior Director Alumni Travel,  
University of Illinois Alumni Association

**Mike Ziemianski**, Treasurer  
Director of Development, Saint Meinrad School of Theology



**Carver**



**Ammons**



**Amos**



**Bahlman**



**Campbell Lund**



**Chambers**



**Crossley**



**Dominick**



**Engelhard**



**Exline**



**Friedman**



**Hoover**



**Horn**



**Karzas**



**McArthur**



**Williams, K.**



**Williams, S.**



**Ziemianski**

# Team work

## Book has strategies for today's advancement office.

**Editor's Note:** The following are excerpts from the CASE book, "The New Advancement Team: Strategies, Ideas, and Practices" by Terry Sykora. To order, access CASE Books [www.case.org/books](http://www.case.org/books) Item No. 28165. Cost is \$46.95 for nonmembers and \$34.95 for CASE members.

### No Vision/No Values

A campaign or other immediate development objective so dominates the attention of advancement staff that broader matters of organizational mission are seldom addressed. Staff members lack a shared vision of what the advancement office is or should be, and how their respective roles support and promote that vision.

Example: One institution launched a major campaign without benefit of a silent phase, pre-campaign planning, or volunteer development. There had been little staff or systems development. The immediate focus of the campaign caused the institution to defer much of the work to build the development team for the long haul. Considerable staff turnover and systems/management difficulties have ensued, and something close to a mercenary spirit prevails in the office.



The next time around, the annual-fund staffer spends about one-tenth of the time on the piece, knowing that no matter how much effort she put into it her supervisor will re-work it. Eventually, the supervisor essentially assumes the responsibility for drafting fund appeals—while the staff member looks on with a mixture of resignation and amusement.

### InfoQuicksand

InfoQuicksand sets in when advancement offices information systems are fragmented, inconsistent, and unwieldy. Staff members create new databases and spreadsheets to compensate for deficiencies in the existing resources, solving immediate problems but creating even more administrative overhead and ever-greater possibility of error. Staff members labor under the ever-present fear that the information they are using is flawed—that they are in effect sinking into quicksand.

Example: The major gifts and campaign staff of a university convenes monthly to review prospect activity and chart the next steps toward cultivation and solicitation. However, because of its poor tracking system—rife with inaccuracies and omissions—the group spends more time criticizing data than planning strategy. The campaign director despairs of ever getting a good sense of what is happening with the university's most important prospects.

### Micromanagement/Passive-Aggressive Death Spiral

Managers and staff members in an advancement office often complain about "micromanagement" and "passive-aggressive behavior." What has not been probed sufficiently is the essential connection between the two. Micromanagement begets passivity; passivity begets nano-management, which in turn begets passive-aggressive behavior. Frustration escalates, while trust evaporates—hence the expression "death spiral." It matters not who started what; everyone loses.

Example: An annual-fund staff member works hard to develop an effective direct-mail solicitation letter. Even though it was a credible effort, his supervisor all but rewrites it.

### Oral Traditions

When advancement-office procedures, systems, and training efforts are poorly documented, key operating information becomes transmitted by "oral tradition." This practice makes key office processes susceptible to erosion and unintended change, especially under conditions of high staff turnover.

Example: The gift-processing staff has handed down, "generation after generation," instructions for processing/posting gifts to the university's fund-raising campaign. Three years after the beginning of the campaign, the criteria used to determine what is counted in the campaign has changed markedly from the original plan—without any instruction from senior management.

## Brief CASE

A listing of some of the grants received by CASE V institutions. Send items for Brief CASE to: [advance@uwlax.edu](mailto:advance@uwlax.edu).

**Ball State University** (Muncie, Ind.), \$1 million federal education grant for the Entrepreneurship Dynamics Laboratory, an initiative to bolster Indiana's economy by moving business ideas from inception to reality.

**Calvin College** (Grand Rapids, Mich.) is one of 15 winners in the 2003 awards for the Merck Co. Foundation/American Association for the Advancement of Science (AAAS) Undergraduate Science Research Program. Fifteen awards are made annually and each award provides up to \$60,000 over three years

for joint use by an institution's biology and chemistry departments. The funding supports research stipends for undergraduate students and programs that foster interactions between biology and chemistry departments.

**Cardinal Stritch** (Milwaukee), \$1.8 million over five years from the Lilly Endowment to enhance programs that help prepare a new generation of leaders for church and society.

**The University of Cincinnati**, \$10.2 million from Richard E. Lindner, Cincinnati, and \$10 million from Fifth Third Bank and Fifth Third Bank Foundation, Cincinnati, for the university's Varsity Village athletic facilities

*Continued on next page*

## fiVe.www.ideas

Find a site to see while surfing the Web recently? If so, we'd like to hear about it — and share it with your CASE V colleagues. Send the Web address, and explain why it's helpful to: [advance@uwlax.edu](mailto:advance@uwlax.edu). People whose ideas are selected will receive an *advance* memento.

### Time for new security?

It's always good to keep up-to-date with emergency plans. The following links may be helpful:

- Cornell University — [web.cornell.edu/Emergency/](http://web.cornell.edu/Emergency/)
- Lenoir-Rhyne College — [www.lrc.edu/student/security/emergencyplan.htm](http://www.lrc.edu/student/security/emergencyplan.htm)
- University of Pennsylvania — [www.upenn.edu/about/emergency\\_students.php](http://www.upenn.edu/about/emergency_students.php)
- Stony Brook University — [www.stonybrook.edu/sb/emergency/plan.shtml](http://www.stonybrook.edu/sb/emergency/plan.shtml)
- Pomona College — [www.pomona.edu/emergency/](http://www.pomona.edu/emergency/)
- University of Chicago — [www.uchicago.edu/docs/emergency/plan/](http://www.uchicago.edu/docs/emergency/plan/)
- Carnegie Mellon University — [www.cmu.edu/home/emergency/](http://www.cmu.edu/home/emergency/)
- Dickinson College — [www.dickinson.edu/contact/PRNet](http://www.dickinson.edu/contact/PRNet) queried users in March about heightened security alerts. Find more at: [www.naicu.edu/news/levelorangeresponses.shtml](http://www.naicu.edu/news/levelorangeresponses.shtml) —PIO Net

### U.S. Postal Service site updated

The U.S. Postal Service has completely redesigned its site — [www.usps.com](http://www.usps.com). The new site organizes information users need more effectively. Along with lots of buttons — everything from a ZIP code finder to obtaining a form, the site includes a link for visitors familiar with its site's. The temporary directory gives easy access to products, services, and information. The previous menu design is listed and is paired with its new location.

### Planning an event?

PlanSoft Corp. — [www.mpoint.com](http://www.mpoint.com) — offers an array of conference and event planning information. Sign up to join a discussion, or click on a "hot topic" or the "tip of the week." You have to register to use some of the site's services, but it's free. You can also sign up for a monthly, free newsletter that provides current information about the event-planning world.

—Tip provided by Mike Worely, Ohio University

### An eye for sports

If you're trying to stay ahead of the rest in sports photography, or looking for a sports photographer, click on [www.sportsshooter.com](http://www.sportsshooter.com). The resource for sports photographers and other working photojournalists serves as an informative site for those aspiring to be on the sidelines capturing great sports moments.

—CUE

### Looking for help?

CASE international's Web site might have an answer. Use it to find companies and consultants that offer advancement products and services. Go to: [www.case.org/yellowpages/](http://www.case.org/yellowpages/) To find companies and consultants, either click on the product/service index at the top of every page, or search alphabetically, by state/province, or name. Also refer to the vendor listing in the "Campus Buyers Guide" published each month in *Currents*.

# CASE V file

A look at new faces in CASE V. Send items for CASE V File to: [advance@uwlax.edu](mailto:advance@uwlax.edu). You may include a photo.

**Robin Bowlus**, regional director of development, Bluffton (Ohio) College. She had been development director at Kappa Kappa Gamma Foundation in Columbus, Ohio.

**Susan Grover**, executive director of alumni foundation at Minnesota State University Moorhead.

**Kara Kokotas**, associate director of corporate and foundation relations at Elmhurst (Ill.) College. She had been with the Chicago office of the Nature Conservancy.

**Carmela Kranz**, (see photo) director of development for the School of Public Health with the Minnesota Medical Foundation. She had been an associate director of development for special programs at the Minnesota Medical Foundation.



Kranz



Miller

**Randall Miller**, (see photo) Executive Vice Chancellor of Wayne County Community College District in

metropolitan Detroit. A CASE V member for 15 years, Miller had served as president of the Downriver Campus, one of the five campuses in the 32,000-student system.

**Sarah R. Pearson**, (see photo) vice president for university development for Northwestern University (Evanston, Ill.) She had been associate vice president for development and alumni relations at the University of Chicago.



Pearson

**Lori Pongtana**, manager of phonathon and special events, Bluffton (Ohio) College. She is a 2003 Bluffton graduate.

**Barb Quatman**, director of development, Bluffton (Ohio) College. She had been director of major gifts.

**Susan D. Stumpp**, faculty grants director of Capital University, Columbus, Ohio. She had been a proposal implementation specialist at the University of Pennsylvania in Indiana, Pa.

**Mariah Wright**, director of the annual fund, Denison University, Granville, Ohio. She had been assistant director of Denison's annual fund.

# CASE & Point

In CASE V tradition, here's an opportunity to assist colleagues throughout the District — share an idea that has worked, or explain how you handled a challenge. Send your ideas to: [advance@uwlax.edu](mailto:advance@uwlax.edu). Those submitting ideas printed will receive an *advance* memento.

## What are they looking for on your Web page?

Campbell Research's Alumni Poll 2002 shows that more than half of alumni who visit an institution's Web site (59%) are looking for information about academic courses and programs, far outpacing all other visit purposes. This supports the idea that alumni are frequently your best prospective students. The next most frequent reason is obtaining contact information for faculty, staff or alumni (42%), followed by those seeking campus news (31%), alumni news (30%) and alumni event information (30%). A quarter of Web visitors are seeking information about association membership, while only 15% are seeking sports news.

—Campbell Research's "Alumni Report, March/April 2003" [www.campbell-research.com](http://www.campbell-research.com)

## Consider using more e-mail

Three-quarters of teens have active e-mail addresses. For most, it's their preferred way to communicate. When communicating with teens, do it the way they prefer, not what you want to do. Gather and use e-mail as much as possible. But:

- Keep messages clear — have a reason for sending a message, make it clear in the subject line and the body of the message. Be up front as to its reason.
- Keep messages concise — get to the point quickly.
- Keep messages short — don't commit higher ed's biggest sin by being overly verbose.

E-mail is best used as an enticement to drive students into wanting more information. If your site is attractive, you'll see measurable response.

—StamatsStats, Vol. 4 no. 1, [stamats.com](http://stamats.com)

## Donor software study reveals satisfied users

Campbell Research has announced winners of the 2003 Donor & Member Database Survey User Satisfaction Awards. Donor2 from Systems Support Services earned the highest level of user satisfaction for software, while the online provider eTapestry captured top ratings in its class. Also, awards were presented to Advance from Sungard BSR, PledgeMaker by Softrek, Matchmaker 2000 from Heritage Designs and Direct to Donor from DonorDirect. Awards resulted from an independent online survey of 2,124 users of donor software programs, service bureaus, and online application service providers. Most non-profits use software to manage their donor and/or member databases (95%), as compared to service bureaus or ASPs (5%). But, service bureaus and ASPs generally earned higher satisfaction ratings. The study also revealed that non-profits usually review their software every two years or so, yet one out of five organizations re-evaluates software every year. The average organization has had its software for 4 1/2 years. Smaller organizations replace or upgrade their software more often. See more about the study at: [www.campbell-research.com/studies.htm](http://www.campbell-research.com/studies.htm)

—Campbell Research's "Alumni Report, Jan/Feb 2003"

## What's an 'Annual Fund'?

It depends on who you ask. DataProse asked annual fund executives and they, not surprisingly, agreed that "annual fund" referred to the donation pool used for the day-to-day budget need of the organization. But when people outside the non-profit sector were queried, most believed "annual fund" meant one gift a year. DataProse is advising clients to change fund names to "The (University) Fund." In two cases, multiple solicitations — up to six times a year — resulted in multiple donations and higher revenues.

—Direct Connection, Spring 2003 [www.dataprose.com](http://www.dataprose.com)

## Alumni are visiting Web sites

Nationally, 62 percent of wired alumni report to have visited their four-year college or university's Web site. The figure represents a considerable increase from the 46 percent noted in Campbell Research's first national alumni poll in fall 1999. Because the 2002 survey was done online (the 1999 version was via phone), the 62 percent figure is likely inflated somewhat. Private colleges and universities saw both a larger proportion of alumni visiting and a larger increase (64% to 85%) than did public institutions (50% to 55%).

—Campbell Research's "Alumni Report, Jan/Feb 2003" [www.campbell-research.com](http://www.campbell-research.com)

# Brief CASE

From previous page

enhancement project. Also, \$1 million from Frank R. Noyes, Cincinnati Sportsmedicine & Orthopedic Center, to the university's department of biomedical engineering.

**Elmhurst (Ill.) College**, \$1 million-valued donation from Logility for a supply chain management software suite for its Center for Business and Economics.

**Marygrove College** (Detroit), \$100,000 from Lillian and Donald J. Bauder to endow the public lecture/reading segment of the Marygrove College Contemporary American Authors Lecture Series.

**Mount Mary College** (Milwaukee), \$1.2 million from alumna Rita A. Stevens for the college's capital campaign to construct a science, technology and campus center.

**Otterbein College** (Westerville, Ohio), \$100,000 from the George I. Alden Trust to match funds for two National Science Foundation grants.

**Ripon (Wis.) College**, \$36,000 from the Eisenhower Professional Development Program to continue a program that communicates and shares ideas and cultural information on science, mathematics and technology. The program links two Wisconsin schools with a school in Wales.

**Western (Macomb) Illinois University**, 20 acres of land on the Moline, Ill., riverfront from Deere & Co. The gift provides the university an opportunity to expand its Quad City facilities and better meet the need for public higher education in the Quad Cities.

**Wooster (Ohio) College**, a four-year \$268,000 grant from the National Science Foundation for its physics department to continue its summer Research Experience for Undergraduates program.



## Parting Shot...

The 95,000-square-foot Tostrud Center at St. Olaf College (Northfield, Minn.) boasts an aerobics training facility, cutting-edge exercise machines, a weight-training facility, an elevated walking and jogging ring, a six-lane, 200-meter track, five tennis courts and a 48-foot-high rock-climbing wall. The state-of-the-art recreation and fitness center was dedicated in September 2002. St. Olaf College, affiliated with the Evangelical Lutheran Church in America (ELCA), is a liberal arts institution that fosters the development of mind, body and spirit. The college provides personalized instruction and diverse learning environments, with nearly two-thirds of its students participating in international studies. —*Photo by Tom Roster*

In each issue, *advance* will attempt to feature a photo highlighting a program or physical characteristic on a CASE V campus that's unique to the region. For consideration, send your photo and brief description to: [advance@uwlax.edu](mailto:advance@uwlax.edu) or the address below. Campuses selected will receive an *advance* memento.

## Ohio, Wisconsin leaders are tops in district

**T**he president of an Ohio community college and a Wisconsin chancellor are CASE V's top administrators. Cuyahoga Community College (Cleveland)

President Jerry Sue Thornton and University of Wisconsin-Milwaukee

Chancellor Nancy L. Zimpher have received the district's 2003 Chief Executive Leadership Awards.

Established in 1999, the award recognizes District V CEOs for outstanding leadership and service in support of education. Recipients are honored at the CASE International Assembly in Washington, D.C., July 5-8, 2003, and recognized again at the CASE V



Thornton



Zimpher

Conference in December.

Thornton, president of Ohio's largest community college since 1992, has led the updating of the college's curriculum and calendar, along with opening of technology centers at three of its campuses.

Zimpher, at Milwaukee since 1998, has revitalized the UW System's second largest campus. She has implemented a variety of innovative programs, including the "Milwaukee Idea," an initiative to forge vital and long-lasting, community-university partnerships.

### CASE V CEO award recipients

- 1999**—**Sister Mary Andrew Matesich**, president, Ohio Dominican College (Columbus)
- 2000**—**Robert G. Bottoms**, president, DePauw University (Greencastle, Ind.)
- 2001**—**Joseph Steger**, president, University of Cincinnati
- 2002**—**Judith Bailey**, president of Northern Michigan University (Marquette)
- Samuel Hulbert**, president of Rose-Hulman Institute of Technology (Terre Haute, Ind.)
- 2002**—**Jerry Sue Thornton**, president, Cuyahoga Community College (Cleveland)
- Nancy L. Zimpher**, chancellor, University of Wisconsin-Milwaukee

# advance

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