

NAWM Fall 2024 Meeting Minutes

Day 1 – Friday, September 13, 2024

Attendees – Jim Hawksworth, Ben Seib, Jared Lange, Kevin Meyer, Bobby Horton, David Zimmerman, Mike Berry, Wayne Hentrup, Jonah Billups, Kip Chase, Ken Farris, Chris Carpenter, CP Porter, Kyle Bender, Brian Shelbourne, Tony Unfried, Todd Vogel, John Castro

Visitors – Ron Dostal, Mike Warren, Michelle Janssen, Scott Feller, Emily Vetne, Hugh Vandivier, Susan Dyer, Joe Klen, Steven Jones, Jake Riley, Kim Johnson

Opening Remarks

Jim opened the meeting, welcoming the group to campus. Chris moved to approve the minutes, Tony seconded. Unanimous approval

Jim introduced new directors – Ben Seib and CP Porter (in attendance) along with Andy Rankin (not in attendance) - and announced the resignation of Jake German. Jim noted that there are two open slots and noted that the Nominating Committee is exploring potential candidates.

Jim shared a recap of major campus events since the May 2024 meeting. Major highlights included the graduation of 184 members of the Class of 2024, the ringing in 265 freshmen as part of the Class of 2028, and the class agent forum. Jim then asked the group to share Wabash events/interactions from members during the intervening period between meetings. Kip noted Lilly hosted a recruiting event on campus with 55 attendees and highlighted a Women's Collective Event in Indianapolis in Broad Ripple, including a speech detailing the \$200K in grants provided by the Collective. Jared noted that Prof. Eric Dunaway spoke to the DFW alumni group with an academic presentation.

Jim noted a few follow-up items from the May 2024 meeting. First, Jim thanked the group for donating gently-used professional clothing for use by current students. Second, Jim discussed the meeting calendar for the 2024-2025 academic year, specifically noting that the Spring 2025 meeting will be back on Commencement Weekend (versus Admitted Students Weekend). Third, Jim noted that board vacancies current today reflect the need to build the pipeline of potential candidates for the NAWM board. Kyle encouraged the board to leverage Ron's work on updating engagement data in developing candidates.

Conversation with President Feller

President Feller noted he planned to give updates on priority initiatives as well as provide time for Q&A from the board. He first provided updates on enrollment. Scott noted that small college enrollment trends are generally not positive, highlighting NCAC member Wittenberg's \$18M deficit and drop in enrollment from 1800 students to 1300 students. President Feller noted that Wabash's enrollment trend slightly differs from the trend, citing 882 students on campus (the highest mark in the last 10 years). He also noted that this

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census shows the highest number of students living on campus ever. President Feller also credited retention figures, which are extremely strong across all classes (93%, highest in history of the college).

Second, President Feller provided an update on philanthropy. President Feller noted over 40% of alumni gave to the annual fund and that total annual fund dollars donated in FY24 beat the goal. He noted that Wabash received \$52M in philanthropy last year, led by the \$25M from the Lilly Endowment. Even without the Lilly Endowment, Wabash received the most funds in a single year in its history from philanthropic endeavors. President Feller noted that the College is adding \$10M to the endowment on average each year; coupled with reduced endowment draw (5.5%), the endowment is currently above \$400M. Jim asked if the donation curve is steepening based on last year's figures; President Feller said yes and highlighted the growth of the planned giving pipeline along with last year's collections. President Feller noted that the College's 200th anniversary in 2032 is approaching, and he asked this group to reflect on what the opportunity might be to give.

Third, President Feller noted the college is focused on developing a sense of belonging among current students. President Feller noted that Chapel Sing brought incredible energy and participation, particularly the recent reframing of working to "earn a W". President Feller also noted that the sense of belonging is important for faculty recruiting and retention, whose searches could be international. President Feller also discussed how alumni involvement and spousal connection is important, as he hopes to avoid having Wabash just belong to the graduate and instead the whole family.

Tony asked for an update on the community center. President Feller noted the process is going slower than expected, mainly related to the USDA loan application process. He specifically noted that the Indiana Department of Historic Preservation and Archaeology has provided feedback that must be addressed before receiving the loan. President Feller noted that it is a hurdle but is not a barrier that cannot be overcome. President Feller also noted that the temporary dining setup is behind schedule, with the latest estimated start date of Fall Break. Kyle asked about the impact on students with the delay. President Feller noted that they performed a lot of electrical infrastructure work over the summer, with a pause through Homecoming and restarting afterward. President Feller anticipates the student impact will be more impactful during the construction of the building itself.

Kevin asked what the NAWM board can do to help/potentially change. President Feller noted that the NAWM board can be catalysts in the conversations around enrollment, philanthropy, and developing a sense of belonging. He brought a specific example of how we should reframe how we discuss the Monon Bell Game, specifically not making the school down south as an "enemy" versus a healthy rival. President Feller noted that there is a luncheon in Indianapolis on the Wednesday before the Bell Game that will be an intentional mixer & program for Wabash and DePauw alums.

Ron Dostal Report

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Ron began his presentation that his job involves promoting two aims: (1) engage more people; and (2) engage people more. Ron noted that giving – particularly large gifts – is a direct reflection of duration and quality of engagement, and with a new capital campaign coming in the near future, this work has heightened importance. Ron detailed the level of engagement levels that his office measures: (1) opting out; (2) drifting away; (3) connecting remotely/passively; (4) engaging somewhat; (5) engaging consistently; and (6) engaging significantly. The largest group of alumni based on this framework is segment 3: Connected Remotely/Passively at 43.6%, with segments 4-6 taking up 48%. However, excluding nongraduates, segment 3 constitutes 37% (about 4K people) and segments 4-6 taking up 60%.

Ron noted trend data related to engagement based on length of time from graduation. He noted that the myth of the “donut hole” doesn’t really exist; instead, the main issue is the steep drop-offs at 5 years out and 10 years out. John asked if we’ve done introspection into the young alumni group; Ron noted it has not been super intentional, with Dean Janssen noting that the alumni survey 2-3 years ago did not include enough focus on this group. Ben opined that we need to think about this kind of young alumni engagement at the time of admission due to potentially unclear expectations about what Wabash is giving you. Kevin agreed and emphasized the need to help current students. Chris noted that the most volatile time to collect/maintain contact information is the first 5-10 years after graduation due to moving, job changes, marriage, and other major life changes.

Ron also shared data demonstrating that volunteering and attendance at college functions (on campus or regional events) is directly correlated with donations to the college. Mike asked if the data is correlated with the young alumni drop; Ron hasn’t fully examined that data yet. Ron also shared data that there are 580 donors who had given over \$1K (lifetime) prior to FY20 who have not donated since COVID. Ron also shared data detailing that 80% of the previous 50 graduating classes have 60 or more members in segment 3.

Ron ended his presentation by emphasizing that most of our events that the college does is targeted toward highly engaged people, which could create diminishing returns. Ron wants his team to be freed up to work toward segment 3. Kip acknowledged the strong step in displaying this data and asked how President Feller’s approach toward incremental improvement impacts Ron’s work. Ron noted that President Feller’s approach keeps him from making drastic changes but instead looking at individual variables (e.g., the symposium at Big Bash).

Fundraising Update & Discussion

Emily and Hugh shared an FY24 recap. Budget of \$3.70M, raised \$3.8M. 11th straight year of 40% alumni participation, noting that 705 new FY alumni donors were done in June 2024. FY25 goal is \$3.75M in dollars, with 40% target again. Emily shared data showing that being in a reunion year helps with total dollars given, but some of the participation rates are below

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the 40% target. Emily also noted that segments 4, 5, and 6 often help “pay the bills” to meet the annual fund goals and asked the board to keep in mind the difference between engagement work (targeted toward segment 3) and fundraising (targeted toward segments 4, 5, and 6).

Hugh and Emily led a discussion around three questions: (1) how to engage the 90s-00s classmates? (2) What new or different ways can our team help us in our roles? (3) Thinking of those donors we work to renew each year, how can we work together to inspire giving year-round? In response to these questions, a few themes emerged: (1) text versus call outreach; (2) more intentional planning with affinity groups beyond class (e.g., not a random message the day before); (3) promotion of automatic recurring donations.

Professional Development Discussion

Dean Jones and Jake Riley provided an update on current professional development work as well as provided an ask of the NAWM board. Dean Jones reminded us that the greatest impact we can provide is access and mentorship to employment opportunities and summer programs. He also recommended members of the NAWM board return for Coffee and Careers on Thursdays in the library. Dean Jones noted that the first destination rate (a specific placement, could be a job, internship, grad school) for the class of 2024 is 87%, lower than target. This target differs from the knowledge rate (knowing what is happening, even if it's nothing).

Culturally, Dean Jones noted that they are working to convince students that having experience on their resume is beneficial to their job & career prospects. The board discussed helping students handle the interview process, particularly around professional communication.

Wallies' Voices

Jonah discussed some of the work within the Student Senate. He mentioned that the Student Senate is considering planning events for Monon Bell week meant to foster a spirit of friendly rivalry and asked the group about the merits of alumni involvement in these events (some or all).

Jonah also shared certain members of the Student Senate asked about the role of NAWM generally. Jim noted that we are ambassadors of the College and support the college in many ways, including time and financially. Jim also noted that the NAWM also is visible through our awards (athletics hall of fame, alumni awards of merit).

Dr. Horton shared a faculty perspective that they sense optimism about the trajectory of the college and energy on campus, particularly in light of another year further away from 2020. Dr. Horton also noted that the faculty sense a lack of professionalism among some of the students and noted that the students don't always sense it's counter normative. Dr. Horton

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also noted that many freshmen face a reading and writing gap (particularly reading books and writing essays). This reality impacts expectations among course work and requires pivots within the classroom. He also noted that faculty are adjusting to AI use among students, trying to balance teaching critically with the expectation that AI will be used in their careers.

Ron discussed the regional club perspective. He noted that in FY24, the regional boards held 125 in-person events, 44 Monon Bell telecast parties, and numerous virtual events. He highlighted how engagement with Wabash is much easier than it has ever been due to the virtual component and regional board structure. Wayne noted that provision of meaningful swag would be helpful if they can fit within the budget, as it can serve as another touchpoint for engagement to draw affinity to the college.

Chris discussed the Class Agents Forum held the weekend of September 6, 2024, and provided an overview of the role of a class agent. He noted that attendance was lower than desired (30-35 out of 100+ class agents), so Chris shared that the forum is exploring ways to bring more involvement & engagement with that group. He also explained that the forum is conscious of the lack of good contact information within Advancement and are exploring how to maintain/validate that information. Chris highlighted that the forum is exploring the value of structuring engagement & outreach around class year given that affinity is not rated as highly related to other affinities.

Committee Recaps/Read-Outs

Nominating Committee – Tony shared that the board will receive an email to input potential board candidates, with the committee asking for certain criteria (availability/capacity, best person to cultivate, rationale why to join). Tony also shared the schedule of nominations that the committee will discuss and create a slate. Tony also shared that the nominating committee is going to build out more criteria around the alumni awards of merit. Tony ended by stating that the committee is also going to build a slate for alumni trustees and develop a rubric/standards for alumni trustee candidates.

Communications & Visibility – Todd shared that they are looking for additional members; they will discuss with the executive committee. Todd also reviewed Wabash's Instagram platform and compared it to similar pages at peer institutions. He noted that Wabash runs their page very similarly by highlighting students, mascots, rankings, and buildings, without any dating on the posts. Todd noted that not many colleges have alumni-specific accounts and made the argument that NAWM's Instagram may be the way to drive that effort. He highlighted a variety of potential content that could be included in such an effort.

College Assistance – Brian shared that the reconnection project showed limited success, but the data Ron showed earlier in the meeting showing the 5/10 year engagement dump has shifted the focus of that work toward that demographic. Brian also discussed the need for connecting with seniors prior to graduation to make sure we have engagement foundations,

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with the idea of restarting the senior luncheon but with a more targeted invitation (based on low attendance patterns in the past). Jim suggested invited seniors have to “bring a junior” as a potential way to drive attendance. Wayne also mentioned the need to onboard those graduating seniors to the regional groups.

Saturday, September 14, 2024

Attendees – Jim Hawksworth, Ben Seib, Kevin Meyer, Bobby Horton, Mike Berry, Wayne Hentrup, Jonah Billups, Ken Farris, Chris Carpenter, CP Porter, Kyle Bender, Brian Shelbourne, Todd Vogel, John Castro

Visitors – Ron Dostal, Mike Warren

Committee Report Outs (Continued)

Data Review – Chris provided an update from the committee on the status of the data review work related to contact information of alumni. Chris noted two main concerns about contact information of alumni in the Wabash systems: (1) missing information; and (2) inaccurate information within the systems. Chris discussed Brad Weaver (head of IT at Wabash) and his visit with the committee, providing gratitude for him visiting at a time where the committee had explored & synthesized their thoughts (versus reactionary and potentially making rash recommendations). NOTE – Brad loves Jack’s Donuts, we shouldn’t forget.

Substantively, Chris discussed the potential for data mining alumni contact information using other sources beyond having the user affirmatively provide their contact information. Chris noted the ubiquity of LinkedIn for contact information and discussed the potential of using those login credentials to log into eServices (“Social Sign-On”) as well as request permission to share information for others they are connected to. This information can then be used to compare to what is in Colleague (the current CRM). Chris did note that Colleague is likely to be replaced within 2-3 years, which could open the door to think more holistically about how contact information is being collected & validated. Brad is generally open to the concept of a Social Sign-On but likely wouldn’t spearhead the work due to his focus on security & hardware maintenance.

The board discussed the merits and and drawbacks of shifting data mining to LinkedIn and away from the eServices process. Ron noted that there’s no cost for this approach but the potential for inaccurate information for LinkedIn would still exist. Mike noted that Experian can help weed through inaccurate information to get preferred/most viable contact information, but there would be a financial cost (TBD). Ron noted that the College views data more from a security lens versus treating it as an asset to optimize.

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Communications & Visibility – Todd shared that Richard Paige joined their meeting and noted some misalignment about the purpose of how the college's communication tools and how they can be maximized. Todd noted that Richard did validate the primary social media tools based on age of the user (20s-30s – Instagram, 40-50 – Facebook). With that conversation, the committee felt the piece that needs to be emphasized is how we get our content out, with the focus of using Instagram. John noted the onus is on the committee to get a calendar set for content to Ron (who owns the Instagram account) and then utilize content already produced or the limited content we would create specific to NAWM exposure/alumni outreach.

Chris moved to close, John seconded. Motion approved.