

**IUPUC Board of Advisors  
November 14, 2018  
Columbus Learning Center – Summerville Room**

**Minutes**

Attending: Dave Barker, Holly Cheek, Clayton Force, Jacquie Franz, Joe Fuehne, Tom Harmon, Joe Heltzel, Reinhold Hill, Carla Laymon, Jay Lesandrini, Karen Niverson, Srikanth Padmanabhan, Gil Palmer, James Persinger, Amy Pettit, Jim Plump, Jim Roberts, Seth Sharpe, Matt Souza, Gregg Summerville, Brenda Vogel, Tom Vujovich

Not Attending: John Burnett, David Elwood, Melinda Engelking DeLap, Cindy Frey, Edgar Hernandez, Jack Hess, Jason Hester, Rick Johnson, Jim Lienhoop, Lori Montalbano, Greg Pence, Matt Rothrock

Guests: Libby Carlile, Marie Harris, Bryant Lucas, Jenny Dill McGill, Brian Yeley

**Welcome**

**Gregg Summerville**

The meeting began at 12:03 pm. Chair Gregg Summerville welcomed everyone and introduced Brian Yeley from the IU Foundation and also new board member Clayton Force who received his undergraduate and graduate degrees from Purdue University and is the vice president at Force Construction. He also announced another board member, Edgar Hernandez. He started his education at Ivy Tech then transferred to IUPUC where he received his degree in Business finance in addition to a certificate from IUPUI in computer programming. He works at Cummins Inc. He cannot be here today because he is in Washington DC accepting an award. There is also a 3<sup>rd</sup> potential new member and we should know in a couple of weeks.

**Introductions**

**Brenda Vogel, Reinhold Hill**

Brenda introduced Marie Harris who is the senior associate director of IU Foundation and on the regional development team. This team is part of a group who go out and touch base outside the IU regions and travel to make contacts, helping us create larger and more robust portfolios and bringing in gifts. Part of her focus is Columbus.

Dr. Hill welcomes everyone and spoke of the latest strategic directions we are taking with enrollment management, some of the products we are picking up, and wishes to get your feedback and thoughts. Last year, we had growth in applications and admissions, but still no growth in enrollment. The discussion today will be some of the things being doing today in order to actually have yield on those increasing numbers of applications and admissions. Joe Heltzel will give you more updates.

**Enrollment Update**

**Joe Heltzel**

- Fall 2019 Applications: 573, up 15% from last year, in-service region only (Bartholomew, Brown, Decatur, Franklin, Jackson, Jennings, Johnson, Shelby, and some Madison).
- In-region applications: 324, up 12% from last year
- Admits: 417, up 34.1% from last year

For the past year and one-half, we are looking at where we are going strategically and who do we need to be in partnership with to get there.

Current vendor relationships:

**Live Chat** - Pop-ups on the website that IUPUC has had for about a year. An offline customer service software with live support, help desk software, and web analytics capabilities. Allows website guests to chat and receive immediate responses from Admissions staff.

**Cappex** (thru high school) – Helps colleges increase enrollment by digitally marketing to targeted student segments, surfacing genuine student leads, and facilitating connections of mutual interest.

**Portara** (newest-communication with parents) – helps fill the information gap of parents and the complex admissions process by inviting parents of prospective students to receive unbiased content and resources.

Currently Researching:

**RaiseMe** – Enables students to earn scholarships throughout high school, starting as early as 9<sup>th</sup> grade, for doing things such as getting good grades, volunteering in the community or joining an extracurricular.

**AdmitHub** – a conversational artificial intelligence (AI) texting platform that helps guide students to and through the college admissions process.

**Capture** – The industry-leading marketing automation software built specifically for higher education admissions and advancement offices. Capture would identify and track the behavior of visitors coming to the IUPUC website.

### Other updates

- Scholarships
  - added 2 admission-based scholarships
  - decreased the lowest GPA requirement from 3.0 to 2.8
  - introduced stackable awards
  - introduced online nomination for counselors
- Admissions website
  - easier navigation
  - parent information
  - find my counselor interactive tool
- Process improvements
  - Application processing overhaul
    - Letter processing automation
    - Increased use of student workers
  - Counselor assignment model
  - Creation and updating of SOP Guides
- Marketing
  - Increased use of CRM, Salesforce
  - Introduction of new print materials
- Enrollment deposit
  - Fall first year beginners only
  - \$100, non-refundable
- Apply IU shared online application
  - 1 application
  - 1 application fee
  - 1 set of documents (transcript/scores)
- Office team members
  - New bilingual student worker
  - Two new admissions staff
  - One promotion

Print recruitment materials

Libby Carlile, Asst. Director, Admissions

Digital recruitment campaigns are used as a supplemental with print materials. Email is used the most which uses hyperlinks that send potential students to their website resulting in 'student campaigns':

- **Search**, from students who have not looked at IUPUC before / request for information
- **Suspect**, results from those who have done a 'search' on our website
- **Incomplete application**, results in the student now starting to complete an application
- **Completed application**, results from those filling out the application
- **Admitted student**, results from those who have completed application
- **Commit & deposit**
- **Visit campus**
- *In progress – scholarships, bilingual, transfer and parent*

Materials:

- Viewbook
- Search piece – first year & transfer
- Student life
- Rack card – all 4-year programs
- Postcard apply now and visit campus
- Event poster, explore IUPUC & VIP days
- *In progress – scholarship & bilingual*

How do we use these materials?

- College Fair visits
- High School visits
- Individual campus visits
- Group campus visits

**Campus Safety and Security**

**Captain Bryant Lucas**

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- 2010 IU combined all the campus' law enforcement into one unit
  - 2012 IUPD established presence at IUPUC
    - Prior to this time we had a night security program (private vendor)
  
  - 2015 IUPD established as public safety for campus
    - Did away with the private security
    - IUPD took over the entire public safety responsibility for all the campuses
    - City contract with the city for the AMCE building and the Columbus Learning Center
    - Ivy Tech contract for their building and the ag building down the road
    - Hired another full-time officer
    - Cadet program starts
      - ✓ 2 year program
      - ✓ Students who want to be law enforcement officers
      - ✓ Work as a security officer under the supervision of the authority of the IU police department
      - ✓ provided trainings and uniform
      - ✓ extra ears and eyes for the campus
      - ✓ not armed and have no authority
      - ✓ between junior and senior year they can attend the police academy
      - ✓ when the cadet graduates, they have a degree, law enforcement certification, and experience
      - ✓ generally 6-8 cadets at a time and have had 3 complete the program to graduation and 2 have jobs with the Bartholomew Co. Sheriff's Department
  - 2015 IUPD and IUEM (Emergency Management) begin yearly updates to Emergency Action Plan
  - 2015 Video produced by IU is shown on run, hide, or fight when involved with active shooter.
  - 2018 IUPD adds a second patrol officer
  - IUPD begins patrol of Miller building (School of Architecture)

## **Win-Win Vehicles for Gifts to IUPUC**

**Brian Yeley, IU Foundation**

Chair Gregg Summerville introduces Brian Yeley, IU Foundation, AVP, Gift Planning Services.

Brian introduces Jennifer Dill-McGill, IU Foundation, Gift Planning Attorney

There are creative ways to support IUPUC beyond just writing a check or perhaps giving stock. We'll focus on connecting your philanthropic goals with estate planning priorities. This is not necessarily transactional but more of a lifetime relationship that ends with one of these gifts.

Note: we have never had a year where we have documented \$100 mm or more of new planned gifts in a single year in the history of the IU Foundation but I'm happy to say we have had two such years with last year being \$130 mm.

- The Basics: Charitable Gift Annuity
  - An irrevocable legal contract between the IU Foundation and a Donor in which the IU Foundation agrees to pay the donor a fixed and guaranteed annuity payment for his or her life (or two lives) in exchange for donor's gift of cash or stock (10K minimum).
- The Basics: Bequests
  - A commitment in a donor's Will or Living Trust that stipulates how the donor's property is to be distributed upon his or her passing (also includes retirement plan assets). This is revocable and amendable.
- The Basics: Life Insurance
  - You can name IUF the beneficiary of any policy (variable, flexible, universal, term, whole, key man).
- The Basics: Charitable IRA Rollover
  - Permanently extended the charitable IRA rollover opportunity
  - Available to donors age 70.5 and older
  - Can transfer up to 100K directly from an IRA to IUF
  - Gift must be outright (No CGAs, CRTs, DAFs)
  - Benefit: no negative effects of increased AGI on tax return (phase outs, marginal tax rate)
- Funding Asset: Real Estate
  - Outright gift of the property
  - Bequest in your Will or Living Trust
  - Bargain Sale
  - Retained Life Estate
  - FLIP Charitable Remainder Trust

## **Vice Chancellor's Update**

**Reinhold Hill**

A large grant (\$100K) from the Heritage Fund has been approved for the IUPUC renovation for the Mental Health Counseling Center. Along with the Elwood's contribution to our matching fund and the \$25k that we raised in the campus campaign, it brings us to a point that we can start construction. We are still trying to raise another \$200K for furnishings and equipment for the space, but we will start the renovation and be prepared to move forward.

We have started an academic master planning process facilitated by our associate dean for academic and student affairs, Dr. Lori Montalbano. This committee will try to anticipate where the areas we can grow in the next 10 years that will meet the community needs. Economic indicators, growth indicators, and working with employers in the region to try to plan how we get there in delivery. One example is that Ivy Tech has a two-year program in cybersecurity and we are looking to add on a second 2-year component for a Bachelor of Applied Science so students would get a four year degree in the process.

Today's meal was provided by IUPUC's Café and we are now able to provide in-house catering where we haven't previously. We're very excited about this as the Café can handle events up to about 100 people. We have been supporting the café annually at a cost of about \$20,000 but with the catering element we may not have to support that this year.

We appreciate your input and participation today.

**Adjournment****Gregg Summerville**

The meeting adjourned at 1:26 pm.

*The next Board meeting is Wednesday, February 13, 2019, at noon  
in the Summerville room located in the Columbus Learning Center.*