

The Search for a Vice President for Institutional Advancement



Carroll University
Waukesha, Wisconsin



Carroll University invites nominations and applications for its Vice President for Institutional Advancement, an uncommonly attractive advancement assignment. New leadership will be asked to move an already mature and successful program in development and alumni relations to new levels of accomplishment at a time of significant progress at the University.

Partnering with President Cindy Gnadinger in launching the institution's next comprehensive campaign aligned with Carroll's new strategic plan, the new VPIA will be gracefully aggressive in all aspects of their work. They will be thoughtful as a leader, caring for detail as a manager, genuine in developing personal relationships, knowledgeable about current advancement programming, and enthusiastic about Carroll's people and programs.

Carroll is prepared to welcome its new VPIA on or around July 1, 2020.



📌 Mission Statement

Carroll University provides a superior education, rooted in its Presbyterian and liberal arts heritage, and draws upon its Christian tradition to prepare all students for vocational success, lifelong learning and service in a diverse and global society.

— Adopted by the Board of Trustees, May 12, 2012

ABOUT CARROLL UNIVERSITY

A true pioneer, Carroll University is Wisconsin's first, four-year institution of higher learning. It was chartered by the Wisconsin Territorial Legislature on January 31, 1846, two years before Wisconsin became a state. Today, Carroll is grounded in the liberal arts tradition, distinctive in the health sciences, and graduates leaders in all fields. It offers more than 95 areas of study, including a variety of graduate programs and a clinical doctorate in physical therapy.

Carroll is proud of its long-standing relationship with the Presbyterian Church (PCUSA). The covenant relationship with The Synod of Lakes and Prairies of the Presbyterian Church (U.S.A.) affirms a mutual commitment to encourage intellectual curiosity, demonstrate excellence in education and seek relevance in the quest of knowledge and its application in a complex global society. Carroll values the diverse cultural, multinational, religious and ethnic makeup of the entire university community. It is committed to cultivating a welcoming and inclusive campus community and creating cross cultural experiences that foster meaningful interactions between individuals of diverse cultures, social identities, perspectives, and experiences.

Carroll University's educational philosophy is sustained by its four pillars of Integrated Knowledge, Lifelong Skills, Enduring Values and Gateway Experiences. These pillars undergird all programs, activities and plans. They support the Carroll experience and the institution's vision for Carroll students to achieve a lifetime of vocational success.



Integrated Knowledge is the very foundation of a quality liberal arts program. The Carroll curriculum emphasizes breadth and depth of learning. Our purpose is to encourage students to recognize the interrelationships among ideas. We believe that students with this understanding will continue to learn, grow and succeed long after they leave the campus.

Lifelong Skills help students prepare for life and work in a world of rapid and constant change. We believe that graduates will continue to evolve and contribute to their communities long after they earn their degrees. To that end, our mission is to help students learn to think critically and creatively, adapt to changing technologies, work efficiently and effectively, collaborate with others and communicate clear, compelling ideas.

Enduring Values help students to consider always the impact of their actions on the world around them. We believe that effective leaders draw their inspiration from strong personal value systems. Our goal, therefore, is to offer students multiple opportunities to make decisions and then to reflect upon their consequences.

Gateway Experiences occur both upon entering and upon leaving Carroll University. We believe that our educational responsibility extends beyond the classroom into every aspect of our students' lives. That is why we place a special emphasis on preparing incoming students for college life and on helping graduates make successful transitions into their first jobs, or graduate and professional schools.

Carroll University Ethos

At Carroll University, we are partners in creating a community that embraces respect, integrity and stewardship. The quality of our life together is central to our mission of excellence in teaching, learning and service.

Respect

We will honor the dignity and worth of each member of our diverse community by building relationships of trust. We will be civil and kind as we engage one another in our work.

Integrity

We will offer our best selves and trust that others will do the same through honesty, fairness and strength of character.

Stewardship

We will cultivate and care for our human, natural and material resources with gratitude, responsibility and accountability.

ABOUT (Cont.)

Carroll is distinguished academically by its innovative Pioneer Core, the centerpiece of the undergraduate experience. A cross-cultural core sequence elevates the general education requirement as an opportunity to explore the arts, humanities, social sciences and natural sciences. As part of the Pioneer Core, all Carroll students are required to complete an immersive learning Cross-Cultural Experience and an integrative global perspectives colloquium.

The University's academic program is organized around the College of Arts and Sciences, College of Health Sciences, and the School of Business.

College of Arts and Sciences

With seven departments, the College of Arts and Sciences offers over 30 undergraduate majors and several master's degrees in education. Faculty are dedicated and innovative educators, and are actively engaged in scholarship, grant writing and service to professional organizations. Faculty have received numerous federal private foundation grant awards and fellowships and have a strong record of peer-reviewed publication and creative work. The College provides most of the instructors for the cross-cultural component of Carroll's innovative Pioneer Core general education program. Opportunities in interdisciplinary education, micro-credentialing, professional development, certificate programs, and project-based learning are currently being explored.

College of Health Sciences

Carroll is a leader in high quality, innovative and contemporary healthcare education. Graduate programs in physical therapy, occupational therapy, physician assistant studies and exercise physiology and undergraduate programs in nursing, public health, athletic training and exercise science account for over 60 percent of Carroll's total enrollment. State-of-the-art facilities, licensure pass rates exceeding national averages, and collaborative, interprofessional curricula have created a destination for students seeking high quality healthcare education grounded in the liberal arts. Future plans include greater diversification of nursing offerings and new niche programs in pathological assisting and neurodiagnostic pathology. Healthcare system partnerships and market driven needs will inform and guide future growth.

School of Business

Established in 2017 and under the leadership of a new dean, the School of Business is projecting significant growth in faculty and student enrollment in the next five years. Building on a commitment to high quality programs, the Business faculty will possess leading-edge knowledge combined with a passion to excel at teaching, while providing both traditional and state-of-the-art delivery of business curricula. The School's vision is to provide an engaging and experiential education that produces highly sought-after graduates and successful alumni.



Degrees Offered

Carroll University awards the following degrees:

Undergraduate

- Associate Degree in Nursing
- Bachelor of Arts
- Bachelor of Science
- Bachelor of Science in Nursing
- Bachelor of Music
- Bachelor of Science in Music Therapy

Graduate

- Doctor of Physical Therapy
- Master of Arts in Teaching
- Master of Business Administration in Business Analytics
- Master of Business Administration in Business Management
- Master of Business Administration in Healthcare Administration
- Master of Education - Curriculum and Instruction
- Master of Education - Adult, Community and Professional Education
- Master of Occupational Therapy
- Master of Science in Educational Leadership
- Master of Science in Exercise Physiology - Clinical
- Master of Science in Nursing - Clinical Nurse Educator
- Master of Science in Physician Assistant Studies
- Master of Science in Sports Physiology and Performance Coaching
- Master of Science of Athletic Training

CARROLL UNIVERSITY BY THE NUMBERS

3,496
total student
body

**2,773 full-time
and 198 part-time
undergraduate
students**

**525 graduate
students**

**Wisconsin 69%
Illinois 25%**

**29 states and
26 countries
represented**

**68% female
and 32% male**

**793 first-year
students with an
average ACT score
of 23.5 enrolled in
Fall 2019**

**First-year-to-
sophomore
retention rates have
increased from
78.6% (2011) to
83.1% (2019)**

**The graduating
class of 2019
consisted of 642
undergraduate
students and 243
graduate students**



Faculty and Staff

Carroll's total FTE employee count increased by over 15 percent in the past decade. As of fall 2019, there were 227 FTE faculty, with 74 percent having terminal degrees. The average class size was 21 students and the student to faculty ratio was 15:1. In addition, the university employs 282 FTE staff.

Students

Beyond the classroom, Carroll engages students in a variety of ways. There are more than 50 student-led organizations. Students are encouraged to live out Carroll's mission of service through volunteering, mentorship programs, civic engagement and more. The Pioneer Volunteer Center connects students to opportunities throughout the year. In addition, students are offered an Alternative Spring Break program, which focuses on positive change through community service. Students also change lives through mentorship in Carroll's pre-college programs via enrichment activities and programs. The University fields 22 NCAA Division III athletic teams. The Pioneers compete in the College Conference of Illinois and Wisconsin (CCIW).

The desire to serve and help others is strong at Carroll. It's part of the Pioneer tradition, from First Year Students' Day of Service to Alumni Volunteer Day. Carroll regularly partners with more than 40 organizations working to improve our community through environmental sustainability, education, poverty alleviation, healthcare and more. Last year alone, students participated in more than 14,000 hours of service.

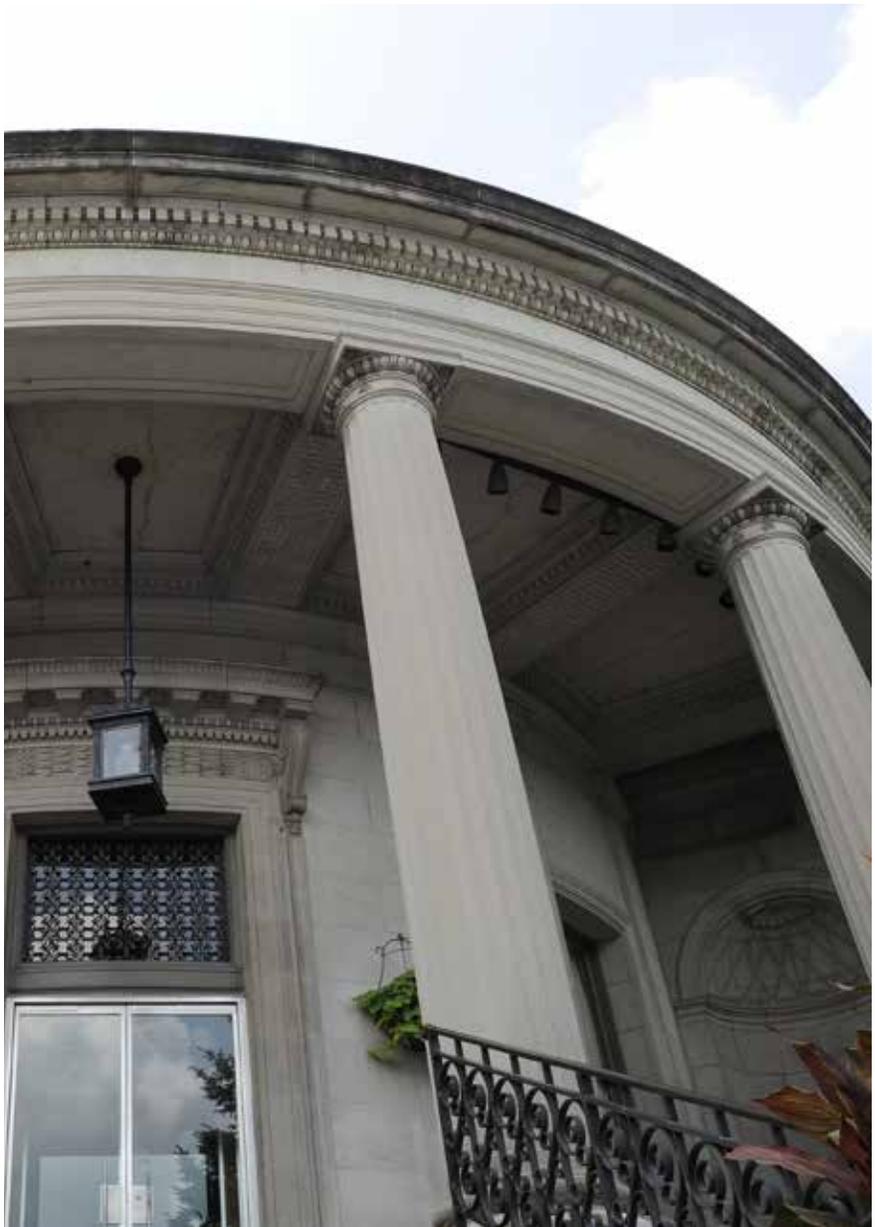
Greater Waukesha Community

Carroll is the only comprehensive college or university located in Waukesha County, which annually ranks as one of the most highly educated, healthiest, fastest growing and wealthiest counties in the state of Wisconsin. The campus is nestled in a residential neighborhood, within a 12-minute walk to historic downtown Waukesha. This charming riverfront city is filled with art galleries, boutique shops and many unique restaurants and coffee shops. The city has been ranked in the top 100 for “Best Communities in the United States for Young People” by America’s Promise Alliance and “100 Best Places to Live” by Money Magazine. In 2018, the City of Waukesha was rated most livable city in Wisconsin and the 36th best U.S. city in which to live by 24/7 WallSt.com.



Financial Overview

The past decade has been a period of financial strength for Carroll, as evidenced by its Composite Financial Index (CFI) hovering between 6.5 and 7.5 percent in recent years. Steady or increased enrollments coupled with a lean-focused discipline have resulted in an operation that regularly generates surpluses sufficient to build reserves, while supporting a robust program of plant maintenance, renewals and replacements. Capital improvements including new construction and renovations of approximately \$125M over the last ten years were financed principally with cash from a \$53 million capital campaign, cash reserves and various grants. The strength of Carroll’s financial position is additionally reflected in its balance sheet with total assets of \$236M and just \$4.2M in long term debt.



ABOUT INSTITUTIONAL ADVANCEMENT

The new Vice President for Institutional Advancement will lead a talented team of 18 professionals, with additional positions under consideration for the upcoming comprehensive campaign. The Office of Institutional Advancement is responsible for: Alumni Engagement, Annual Giving, Advancement Services, Foundation and Corporate Relations, Comprehensive Campaigns, Major Gifts, Planned Giving, and Stewardship and Donor Relations.

➔ Alumni Engagement

With over 22,000 living alumni, the office of alumni engagement offers meaningful engagement opportunities for Carroll alumni. The broad array of alumni activities includes events (homecoming, reunions, local & regional gatherings, etc.) in addition to tailored programs (young alumni, academic-related, athletic, gender, cultural diversity, travel opportunities, etc.). Local and national service projects encourage alumni to live out the university's mission of service in a diverse and global society. Over the last several years, approximately 10-12% of living alumni have participated annually in some form of programming.

The university's new strategic plan calls for the creation of robust experiential learning opportunities (internships, etc.). Alumni will appreciate the opportunities to be involved with student mentoring, internship offerings, job placement, and campus guest lecturing, among others.

Carroll's alumni population is relatively young entering the university's 175th anniversary. Nearly 50% of alumni have graduated since 2000. The "younger" alumni population drives programming—as well as annual fundraising strategies. The expansion of graduate programs has brought a comparatively small, but important and successful alumni segment.

Re-branded and re-designed university publications/materials are providing a fresh and consistent new look. The re-designed university magazine **FIRST** provides energy and content of interest. A monthly electronic newsletter is delivered to alumni containing timely news and activities. The expanded use of video in the repertoire of communications has been of value in storytelling. The university's new website is easier to navigate and helps alumni find opportunities for engagement.

➔ Development

Over the last ten fiscal years, Carroll has averaged over \$6.3 million in annual total gift receipts versus \$3.8 million in the previous ten-year period—a 65% increase. Fiscal year 2018-19 represented the largest ever total of nearly \$10.5 million in gift receipts.

Carroll's last comprehensive campaign surpassed its \$50 million goal, achieving a university campaign record \$52.7 million. The most prominent feature of the campaign was a new science

laboratory building, generating \$22 million in support—making it Carroll's first-ever all gift/grant facility. The final results produced nearly \$27.5 million for facilities; \$13 million for endowment; \$7.5 million for program support, and just under \$5 million for operating support.

The last campaign, completed in September 2016, generated 13 donors making gifts of \$1 million or more, totaling over \$26 million—including Carroll's largest-ever gift at the time—\$5 million. Total donors at all levels totaled 7,533 over the seven years plus campaign. While Carroll's annual alumni participation rate is near the national average for private masters level universities of approximately 9-10%—over 23.5% of Carroll's alumni made a gift during some stage of the comprehensive effort.

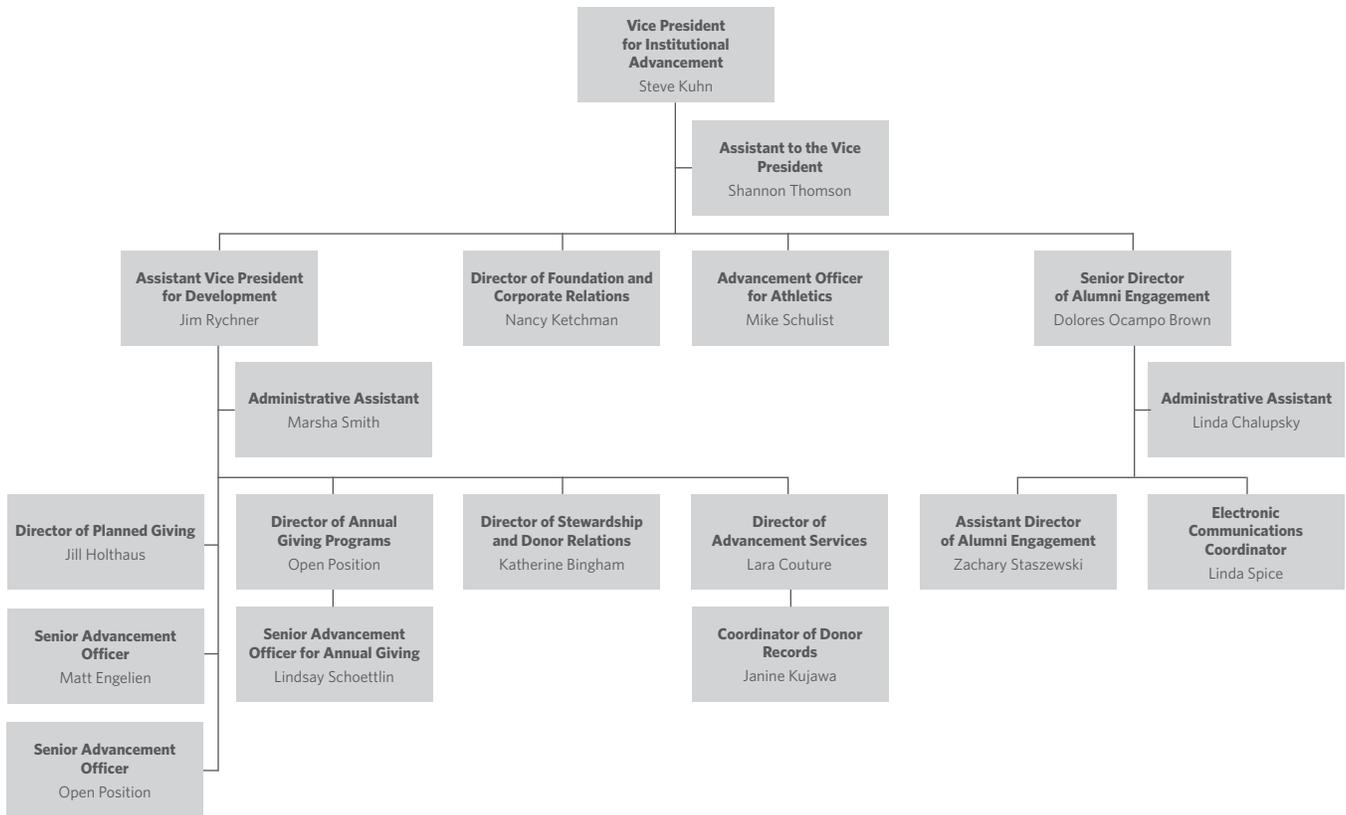
A feasibility study for the next comprehensive campaign was completed in the spring of 2019—generating positive feedback from constituents and a working goal of \$60 million. Carroll's new [strategic plan](#) is generating the key objectives for the campaign including facilities (\$26.5 million) for a new building for business and technology and other facility renovations/upgrades. While Carroll's endowment has grown over the last decade, the campaign is targeting \$25 million for endowment across the institution. Program support (\$3.5 million) and operating support (\$5 million) round out the working goals. Work with key donors has already begun and the selection of a campaign steering committee will be completed by late spring. While much progress has been made over the last decade, there are still many opportunities to significantly expand the base of support. Campaign counsel is being provided by Gonser Gerber.

Development functions include annual giving, major gifts, planned giving, and a foundation and corporate relations office. Athletic fundraising strategy is generated in partnership with leaders in Carroll athletics. Crowdfunding and day-of-giving programs have been added over the last few years, with relative success. The development office also encompasses advancement services and stewardship and donor relations.

Over the last year, Institutional Advancement has been in the process of converting to Blackbaud's Raiser's Edge and other related products. The switch to Raiser's Edge was completed in January 2020. By spring, Blackbaud's Net Community and Peer2Peer products will be implemented providing horsepower and significant opportunities for alumni engagement programming and interaction, as well as crowdfunding and day-of-giving activities. Raiser's Edge and related products will provide for much-improved prospect management and easily accessible reporting, giving both front-line fundraisers and team leadership the information to be more productive and successful.

The stewardship and donor relations function is responsible for strategy and fulfillment of several annual donor-centric events and oversees the donor acknowledgment process.

INSTITUTIONAL ADVANCEMENT ORGANIZATION CHART 2019-20



AGENDA FOR THE NEW VP/IA

This is a transformative opportunity in which the new VP/IA and their team can have a university-wide impact on Carroll's future. The new Vice President will embrace the University's historic strengths and the advancement program's more recent profile of success, while creating an environment to innovate beyond the status quo to new levels of achievement.

The VP/IA will be asked to:

- Direct and successfully complete the new comprehensive campaign utilizing best advancement practices;
- Provide guidance for and partner with the President in the campaign and all related functions;
- Offer leadership and collaboration to faculty, staff, and all academic departments regarding the strengths and applications of the alumni engagement and development programs, thereby enriching Carroll's outreach in a variety of areas;
- Build relationships and manage a portfolio of top campaign prospects;
- Understand and demonstrate the importance of implementing programs that underscore diversity, equity, and inclusion;
- Expand the donor base to help build a pipeline of future major prospects;
- Extend a management style with the Institutional Advancement team that optimizes the talent and impact that staff can have on the overall program, while empowering individual team members through thoughtful performance evaluation and opportunities for professional development;
- Enhance the quality of alumni programming and advance a robust alumni relations effort that provides meaningful engagement and service opportunities; expand the young alumni audience, a critical component in Carroll's future;
- Continuously improve the prospect management system through the effective use of new technologies;
- Ensure a mission-focused institutional advancement plan that builds on Carroll's strengths, while developing strategies that respond to the 21st century philanthropic culture; and
- Assist in the development of a broad pool of prospective trustees.



DESIRED ATTRIBUTES OF THE NEW VICE PRESIDENT

The successful candidate at Carroll will possess a combination of personal qualities and professional experiences that match the expectations outlined in The Agenda for the Vice President. The candidate will bring integrity, energy, an uncompromising work ethic, authenticity, and a sense of humor.

Carroll recognizes that there may be many pathways to a successful candidacy and interest from a variety of venues will be welcomed. That said, an understanding of the academy, the teaching/learning dynamic, and management in an academic environment are all highly desirable.

Beyond this, the successful candidate will be:

- An experienced and successful professional and leader, with a clear track record of vision and success in cultivating and soliciting major and principal donors;
- A person with evidence of effective advancement strategies, especially in the planning and execution of comprehensive campaigns;
- An excellent communicator who listens carefully, writes in a compelling manner, and speaks with inspiration;
- A person of intercultural awareness, experienced in the building of diversity and inclusiveness;
- A passionate proponent and contributor to Carroll's mission and ethos;
- A person who is at ease in the development of strong, genuine interpersonal relationships in all of Carroll's internal and external constituencies;
- A manager who will care for detail, understand the need for data-driven decisions, structure, empower and evaluate staff effectively, and demonstrate financial acumen in all areas of the advancement program;
- A person who fully understands the critical nature of their partnership with Carroll's president and members of the Board of Trustees; and
- A team player, able to work collaboratively and transparently with members of the leadership team, the faculty, and the staff to bring superior results to Carroll's institutional advancement program.



THE APPLICATION PROCESS

The search committee will accept nominations and applications throughout the winter and early spring. A submission deadline of noon CDT, Monday, April 13 is recommended for the most favorable consideration, although applications will be accepted until the position is filled.

Dr. Thomas B. Courtice is assisting with this search. Prospective candidates and nominators may contact him at tom.courtice@gmail.com or at 614.395.6631. All inquiries and applications will be received and evaluated in full confidentiality. Applications from persons in underrepresented groups are highly encouraged.

Application materials should include:

1. A letter of candidacy that responds in detail to the Agenda for the Vice President
2. A complete CV or résumé
3. The names and contact information (phone and email) for three references, none of whom will be contacted until a later stage of the search and not without the candidate's formal permission

Application materials should be submitted electronically to:

President Cindy Gnadinger and the VPIA Search Committee
CarrollVPIA@tbcsearchconsulting.com

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