

## Executive Director's Report, Lara Noah, Feb. 18, 2020

### Developing and communicating a vision and plan for Alpha Chi

In November, Alpha Chi was represented at the 2019 national meeting in New Orleans of the National Collegiate Honors Council (NCHC) by Katie Holmes, Levey Saintil, and me. In time for the meeting and with Melinda's assistance, we produced a beautiful and engaging backdrop for our table in the exhibitor hall. Katie and I shared a room to give Levey an opportunity to go to help him get a feel for the honors environment. He ended up being a great brand ambassador along with Katie. This allowed me time to attend a few sessions with honors program directors and gave me a chance to listen to what's on the minds of current students.

At NCHC, we fielded a lot of questions and made several good initial contacts. We had printed materials on AX for anyone interested. The NCHC program is intense, so we gifted Starbucks cards to show our appreciation to the AX chapter sponsors we saw running from session to session. We invited a new honors co-director from Mercy College (NY), a dormant chapter, to lunch with Drs. Teddi Deka and Craig Jones. I remain hopeful this will end in a reactivation. We also went through the program to find our student members who were presenting, visited with them at their posters, and took some fun photos. They absolutely loved this, and we featured them on our social media. We continue working to increase our profile at conferences like this and even with some of the regional honors councils. It may also be time to look at advertising in the Chronicle now that we've achieved a good marketing foundation and a more polished look.

On February 5th, Katie and I drove to Baton Rouge via UA Monticello to the ACHS Annual Meeting. At UAM we paid a campus visit to Drs. Kate Stewart & Carol Strong and talked about their student successes and plans for attending our upcoming convention. At the ACHS meeting, we met the new ACHS executive director, Ginger Phillips of Arden Solutions. I was very impressed with Ginger and the two staff members who attended and helped the Program Committee plan the meeting. I'll continue serving on that committee, and Katie decided to join the Public Information Committee. This was Katie's first ACHS meeting, and I think she was excited to geek out with others like us.

During the meeting I was surprised and honored to be asked to run for a 3-year term on the ACHS Board of Directors. Knowing that the Council has always supported board terms like this, I agreed to run. I was elected along with one other society director. The ACHS board is only seven members plus its ED, and I believe I'll benefit professionally, as will Alpha Chi, from this opportunity. As it turns out, the 2021 ACHS Conference will be in Little Rock, pending hotel contract, and we'll be happy to open our offices for anyone who would like to visit. I think these next few years will be an important period for ACHS. Attendance at the meeting (like ours) has been down, and efforts will be made this year to reinvigorate the society base to get hopefully get higher participation in the 2021 conference. I feel our presence at this annual conference is important, especially as ACHS member societies struggle with many of the same issues we're facing.

As you may remember, I solicited proposals for our jewelry and merchandise contract last year. We received bids from two other companies, and Tim Brown also sent one. He asked if we could meet, and he came to Little Rock for a long discussion about our needs and concerns. Afterwards I felt a lot better about signing another contract through 2022 with Brown's. We now have a style guide with new artwork finalized by Melinda Hicks. We have a new podium banner, new honor stoles, a possible table runner, and fun things like pop sockets. They will pare down their old inventory to focus on the best-sellers—adding limited-run trends (like the pop sockets) from time to time. Tim and his new marketing director will join us in Albuquerque to launch the new items.

The long-discussed oral history project, now named *Voices of Alpha Chi: 100 Years Strong*, finally launches this year after the development and honing of the guidelines with Dr. Al Clark (who has taken back over as the sponsor at U of La Verne and is bringing two students to the convention this year). I'm appreciative of his passion in bringing this great idea to our attention as we head to our centennial. We'll present this to delegates in ABQ and after the convention to the rest of our chapters with the ultimate goal of collecting and housing oral histories and chapter documentaries on a website to premiere in 2022.

Some unhappy news is that membership acceptance was down by 500 or so members last fall. It could have been related to the new CMS that was not functioning optimally at first. However, as most of you know, college

enrollment is in a well-known slump without much hope for resurgence any time soon. According to a couple student affairs VPs we heard from, the future of enrollment will be in 1st gen, lower income, post-traditional, and non-white students. Efforts to encourage diversity and increase benefits (relevance) to low-income, online, and part-time students will be essential. I don't have a specific recommendation at this time, but the Council's 2017 vote to accept no applications from proprietary institutions may be something to readdress. Most of the large honor societies in ACHS do not observe this practice across the board the way we do now. Some are increasing their resources for chapters at colleges with large online endeavors, and I do recommend we encourage all chapters to find ways to incorporate their online students into Alpha Chi in as many ways as feasible.

On a happier note, I hope to be sending a ballot this semester recommending a new chapter at Ottawa University (OUAZ campus) in Surprise, Arizona. The administrator I spoke with seemed very motivated to get one going.

In ABQ this year you should see an iteration of a centennial logo to be used primarily from Fall 2021 through 2022. We'll need to budget how broadly we produce any centennial tangibles. I've also spoken with former Executive Director Dennis Organ about writing a narrative update of sorts (important events since 1997 where our book of history ended) for the centennial. I was hoping Dennis might be interested, and he didn't disappoint. Within the last year, both President Jones and Archivist Smolleck have visited with the new Southwestern Library staff where our archives are housed and found the staff to be very excited about our centennial and interested in opening the archives for visitors in 2022. I've spoken with several previous Council members who hope to join us in Austin!

I continue focusing on Alpha Chi being "dedicated to making scholarship effective for good." I try to bring this up every chance I get, whether I'm writing a donor, emailing a sponsor, or meeting someone new at a conference. A speaker at ACHS confirmed that social and civil justice issues seem to be resonating with today's college students who are some of the most compassionate and others-focused they've seen in a while. Alpha Chi will do well to continue emphasizing our work in these areas. When the Strategic Planning committee meets in ABQ, I hope we'll have a productive conversation about Alpha Chi's most important values and goals for this next decade.

## **Relationships with the National Council**

I cherish our working and personal relationships and am always encouraged by finding you so willing to help brainstorm or chip in with assistance. While I was down with surgery and recovery through the winter holidays, I received plenty of encouragement and am happy to report that I'm feeling better than I have in well over a year. Par for the course in most transitional or training periods, I may have stepped on a toe or two and hope you will forgive any perceived slight or miscommunication. I hope you feel that I have the best of intentions as I know you have as well.

I had to brag on you in Baton Rouge. Some spoke of disgruntled board members who refuse to do their due diligence or skip out on committee work. Alpha Chi is fortunate to have such a large, devoted board. We'll have at least two new secretary-treasurers and three new student representatives joining us on Friday night of the convention for dinner, and I know you'll join me in greeting them with an enthusiastic welcome.

[\*Aletheia\*](#) is doing very well. Editors Tim Lindblom and Kathi Vosevich will host discussion tables during the convention, and Tim will be around AX Central to speak with students and sponsors about the opportunities the journal provides. I commissioned an article that went on the website not long ago (look for Tim Lindblom's happy face), and I feel it highlighted *Aletheia* as the important benefit of membership we hoped it would be for undergrads looking to publish (and hopefully a great CV cred and experience for our manuscript editors and faculty reviewers). I'll let the rest of editorial staff share stats and details if you're interested, but the journal and peer-review process is accomplishing what we'd hoped it would.

Director's & Officer's liability insurance coverage is current; a fidelity bond is in place; and Conflict of Interest disclosures will be collected soon for 2019-20.

## **Relationships with the regions and local chapters**

I've touched base with each of the secretary-treasurers that are up for election this year. Suzi Pundt will be attending her last convention as the primary chapter sponsor at UT Tyler. She has been steady as a rock, representing Region II on the Council for 12 years at secretary-treasurer, and I'm not sure what we'll do without

her on the scholarship committee. Bob Mahan's decided not to run for a third term, so Region III will need to elect a new secretary-treasurer. Bob has also served the scholarship committee well for a long time. I believe that Teddi Deka, Region IV, and Ken LaSota, Region VI, are willing to run again in their regions.

I hope this year to follow up on some of the ideas the regional student representatives shared at last year's meeting (Facebook live events, training videos, etc.). I hope to get them to create some content in ABQ and then work with the national office social media folks to parse things out to our different channels over the next year. Recently, I realized that the student reps don't have access to the sponsor listserv emails that go out all year, and they may not feel as in touch with news from the national office as those of you who serve as sponsors. (I don't mind adding you seven while you serve as long as you don't forget the audience of those communication is sponsors and not student members, so let me know if you'd like to be subscribed.)

In November, I emailed regional leadership to check in and asked for feedback from them and their chapters, especially in light of the revised convention travel and housing grant methods for the regions without treasuries at this point. While I didn't receive any feedback, a few of them thanked me for touching base.

I continue communications with chapter sponsors via the email listserv but leave most of this to the director of operations. Sponsor transitions are tracked, and incoming and outgoing sponsors receive a hand-signed, formal letter of welcome to AX or appreciation for their service.

This year I've asked Dr. Tanner Babb of Huntington to expand on his workshop from last year so we can share it with all sponsors at this convention. He'll cover all kinds of things but will focus primarily on how to speak the language of college administrators. This will help ensure they know how much your Alpha Chi chapter means to your college and helps them achieve their institutional benchmarks. Dr. Babb and I are working on this session together and will have a time on the program Saturday morning when sponsors go to one room for this and the student delegates go to another room for a special session of their own.

### **Relationships with national office staff**

2019 was a busy year for the national office. As soon as the convention was over, I set a deadline for getting the new Chapter Management System online by the start of 2019-20. The company we used, Virtual Atlantic, had dragged their feet long enough, missing every deadline they'd set for themselves. Everyone in the office had to add testing different functions of the CMS to their normal responsibilities, and I appreciate everyone working so well together on what was a tedious task.

In late November I underwent surgery on my lower back to remove and repair a herniated disk to relieve nerve damage in my right leg. I was out of the office until we reopened on January 2. In 26 years, I've not been away from AX that long, and I was thankful to feel good enough to start back in January. I worked from home when I couldn't sit in an office chair another second. The staff was incredibly supportive and did exactly what they needed to be doing. Katie did a wonderful job in my absence and kept track of all checks and deposits so I could easily go through them as soon as I returned.

The CMS launch in September was a bear, and there's much work and negotiation still to do. It's not yet as we hoped it would be at launch but is functioning and registering members, which is what puts dues in the bank, so we're dealing with it and looking for a tech company to take it over and finish out what is lacking.

Other than the entire staff being rather fatigued by the CMS, the new relationship with Collegiate for member certificate and pin fulfillment services has gone as smoothly as we'd hoped, and everyone seems excited to get to ABQ to pull off another great convention in a few weeks.

### **Management of financial resources**

One fiscal accomplishment for 2019 may have been living through the audit of 2018 with the new auditing firm. I can genuinely say they went over us with a fine-toothed comb. Phil Rickels, CPA, sent his report of fiscal 2018 directly to the Executive Committee and Audit & Finance Committee on Jan. 29, and Dr. Havlak reported all looked well to him. Katie is working with the firm now so they can start on the 2019 audit. With our Council meeting in March for the next couple years, it may be hard to expect a final audit report in time for review at the spring meeting. I feel confident that Audit & Finance can meet virtually as soon as it's ready to go each year and report

to the Council its findings that can be read each year into the minutes. Because this first audit took a while, you may not see a proposed budget for 2020 until the meeting.

Katie took over a few more fiscal procedures this year and was added to the bank accounts, which has been a good thing. There are still things I feel we have yet to nail down post-transition, but the CMS has been so time-consuming for her and Levey that I decided minor things could go on a back burner for now.

Our partnership with Brown's Graduation Supplies goes through summer 2022. We're now also partnered for some discounts with HP. Katie is working on a partnership with GEICO to help replace the Nationwide affinity program they discontinued.

Convention attendance is down again this year, perhaps landing near 300. Most chapters are still bringing several students, but the number of chapters represented (so far) is nearing 70 (similar to last year). The numbers I've considered normal for several years are about 80 chapters and 400 delegates. I can't say the decline doesn't concern me, but it seems in line with the other decreasing trends. With many institutions worried about lower enrollment, even to the point of freezing out-of-state travel, we may be in for a new normal of 300 instead of 450 for convention attendance. This will affect our current and upcoming hotel contracts. I plan to survey as many sponsors as possible this summer about convention attendance in general to see if we can spot other trends that are more in our control.

Our endowment fund had a good year in 2019. As is standard practice, I've asked Lockwood Advisors, the managers of our endowment fund, to provide a report and explanation of 2019 market activity. That should be ready for March's meeting.

At the end of 2019, I sent a gentle year-end giving letter that was really more to touch base and reengage with those who have been donors in the past. (I believe you were copied in on that mailing.) We received roughly \$1200 in donations by mid-January. Our marketing firm has also encouraged us to consider electronic communication which would work well with recent grads but not our prior base of donors. We will consider both going forward. However, the ACHS program again had a session on fundraising that ended with a lot of confusion about fundraising for 501(c)3 groups like us.

According to one speaker, if you're sending a letter for donations in a state, then you need to be registered in that state as a charitable entity. You can't just assume you're exempt from state taxes/filing and would at least have to file for exemption in many states. Every state has its own forms, method, fees, and filing requirements. Not only would that be time-prohibitive at our current staffing, it would be cost-prohibitive. One large specialized honor society said it pays a law firm \$800/month to handle the filing, forms, fees, and annual compliance reports for every state. If that's what it takes, Alpha Chi would do better not to ask for donations. The good news I read this week was that anyone who isn't paid staff (such as Council members) may always fundraise without tax implications, so I hereby give you my blessing. The new ACHS director read the room during that session and promised to seek some answers for us. If any of you have expertise in this area, please let me know.

I hope you have a better feel for the state of the society, at least from my perspective. Please call if you want to discuss anything you've read here or to visit about member, chapter, or board life. I know many of you are on other boards and have worked with many different organizations. Where you see them doing things with better efficacy or insight than Alpha Chi is, I'd appreciate hearing from you.