

# Trustee

*We decided to work with an AGB Consultant, who brings the full force and expertise of AGB to us. ~ The useful part of AGB is the outside perspective, the strong understanding of the principles of governance, and the feedback that was independent of the community. ~ AGB has been vital to our efforts to start a new philanthropic foundation. ~ The demands on the time and energy of truly conscientious trustees have increased substantially. ~ It was very helpful to work with an AGB Consultant who came in and talked to the board about our duties. ~ We gain from our endeavors only what we are willing to put into them, and trusteeship is no exception. ~ Even in these times of fiscal uncertainty, we need to remain steadfast in our support of the volunteer and service programs in our universities and our country. ~ Volunteerism is the glue which holds together everything of lasting value in America. ~ Volunteer board members, alumni, friends, and students give testament to the hope that the education of the whole person will encourage them to give back for the well-being of humanity. ~ Just knowing that AGB has that knowledge and expertise helps ensure that we are operating correctly and in accordance with best practices. ~ No matter what you think you know you don't know what you don't know. ~ Am I making a difference? ~ Through the host of students we empower to make a difference in the lives of those whom they touch, the ripples of their deeds will spread to the ends of the earth. ~ I feel that I get back much more than I give. ~ There is no doubt that volunteering and community service are invaluable to our universities and to communities across our nation. ~ As Congress and the IRS take a very keen interest in foundations and in ways to hold foundations accountable, having an AGB consultant helps us anticipate issues that may not have been issues a few years ago. ~ What impact did I have today? ~ Study after study has revealed that students who are engaged, who perform some type of service while in college, graduate in higher numbers and continue their civic engagement activities throughout their lives. ~ Knowing you've made a difference energizes you no matter how hard you might be working. ~ Volunteering is important not only for the institution but also for the volunteer. ~ In the area of coaching presidents and boards, I think the outside view AGB provides allows for new dialogue and education. ~ AGB was especially helpful to me in understanding how to be an effective trustee. ~ We try to impress on all students that their studies should prepare them, not just to make a living, but to make lives of purpose, characterized by an ethos of service that uplifts those around them. ~ Working with AGB will help us accomplish our goals. ~ In addition to their commitments to work, family and school, our students contribute millions of hours annually to their communities. ~ AGB is working with the system executives to achieve best*

**2008 Annual Report**

The heart of volunteerism lies in the ideals of service and solidarity and the belief that together we make a difference. And truly, it is a matter of the heart. Caring is the motivation behind the desire to be a volunteer. As volunteers share their time, skills, and their money, above all, they share a human experience. It is this shared experience that makes us stronger and healthier.

EILEEN WILSON-OYELARAN, PRESIDENT, KALAMAZOO COLLEGE

# Commitment



**Cynthia Baldwin**  
Chair, AGB  
Trustee,  
Pennsylvania State University  
[cabaldwin@duanemorris.com](mailto:cabaldwin@duanemorris.com)



**Richard D. Legon**  
President, AGB  
Trustee,  
Virginia State University  
[rickl@agb.org](mailto:rickl@agb.org)

*One of this country's most sacred traditions is the unique role that volunteerism has played in the development and success of our society.*

At risk is our ability to meet the country's needs for a dramatic increase in the number of college graduates who are able to assume their place in a highly competitive global economy.

DEAR COLLEAGUES:

AGB's 2008 Annual Report, which comes to you during a time of great economic upheaval and uncertainty, is the first that we are sharing only in electronic format. We hope you find this an effective way to summarize the association's work and recent achievements. Please feel free to further distribute the report, and let us know if you like this format. As always, we welcome your comments.

Since late 2006, the Association of Governing Boards of Universities and Colleges has been focusing much of its broadened agenda on four priorities contained in a strategic plan approved by our Board of Directors. We have made progress across all of the primary objectives contained in the planning document, including expanding our services, conducting new and important research about higher education governance and the academic presidency, and adding the voice of higher education's volunteers to some of the strategic public policy issues confronting higher education. We started 2008 with the association's move to a new location, leaving our home of over 30 years at One Dupont Circle. We hope you will visit our new office location if you haven't already done so.

Our institutions and the boards and Chief Executives who lead them are confronted by an enormous number of variables. We have seen increased pressure on Chief Executive Officers and governing bodies to be more accountable through new regulatory mandates and ongoing threats to our autonomy; at the same time, all of our colleges and universities, both public and private, are addressing fundamental challenges to their financial health and their ability to meet society's expectations.

These are, perhaps, the most challenging and complex times that any of us has ever faced. At risk is our ability to meet the country's needs for a dramatic increase in the number of college graduates who are able to assume their place in a highly competitive global economy. To ensure our ability not merely to keep pace but to compete, we will need to increase success rates, not only in our colleges and universities, but also at the K-12 level. We applaud a recent report of the College Board that candidly charges higher education to work with K-12 leaders to ensure a healthy pipeline of students and calls upon policy makers to invest in student preparation. That report, as well as AGB's report, "Aligning Higher Education Priorities with 21<sup>st</sup> Century Realities," the result of a joint meeting with the Miller Center at the University of Virginia last June, urges higher education leadership, including governing board members, to advocate on behalf of state higher education agendas, a model that works for both public and independent institutions.

AGB will be giving special attention to issues of state public agendas along with our ongoing work with presidents and boards on issues of higher education cost and student learning outcomes. Increased board accountability requires that boards see their fiduciary responsibilities as including a broader understanding and oversight of academic issues, including student learning, success measurement, and degree attainment. Some of AGB's newest consulting services include work with boards and administrators on strategic finance, which bridges both the fiscal and academic areas of institutional decision-making.

As we look at the challenges ahead, we urge you and your colleagues to make good use of the many services available from AGB. Our newest consulting services include strategies to move your board to a higher level of strategic engagement, and we now offer an inclusive comprehensive process for reviewing the performance of Chief Executive Officers. While these times are tough for all of us economically, no leader in higher education can afford to have missed our National Conference on Trusteeship (April 18 to 22 in San Diego). We planned a dynamic program and offered timely webinars, as well as other programming and data collection of direct benefit to you.

One of this country's most sacred traditions is the unique role that volunteerism has played in the development and success of our society. Higher education is often seen as the best model of our spirit of volunteerism. Over the last number of years, much of the criticism of our sector has been targeted at failures of board governance; some of that criticism was warranted. Our governance performance must demonstrate that we merit the autonomy and independence that is central to the tradition of independent boards setting policy for our colleges and universities. If we fail to get governance right, policy makers will be far more aggressive in mandating how we conduct our fiduciary responsibilities in the future. It is important that this increased pressure on governance performance and accountability inhibits neither our citizens' interest nor their willingness to serve.

AGB is pleased to serve higher education's leadership. We are proud of this association's commitment to serving you, and the programs that have been designed with your responsibilities in mind.

We wish you success in the challenging year ahead, and we welcome your questions, concerns, and recommendations.

Sincerely,

Cynthia Baldwin

Richard D. Legon

# The Heart of Volunteerism

More than 50,000 volunteers serve as trustees and regents of over 4,000 colleges and universities in the United States, carrying out a uniquely American tradition of volunteerism and philanthropy. While many of the rest of the world's systems of higher education are controlled by central ministries of education, our American forebears recognized that colleges and universities are best stewarded by the people, not by government. Thus, the system of surrogates of the general public was born, men and women who, as volunteers, are entrusted with oversight of our academic institutions.

In a year when so much change swirled around higher education, the principle of citizen trusteeship and the broader value of volunteerism remain constant. The social compact between higher education and the needs and aspirations of society continues to have its roots in the capacity of citizens who, while not experts in higher education, are committed to working with institution leaders to provide to community, state, region, and nation an unparalleled resource.

For over 85 years, the Association of Governing Boards of Universities and Colleges (AGB) has served these boards, as well as presidents and chancellors, on matters of institutional, system, coordinating, and more recently institution-related foundation board governance. With over 1,270 active member boards representing 37,000 volunteers and institutional leaders and a 98 percent board retention rate, AGB is known as a valued partner and essential resource for higher education governance through its publications and programming. Ever more is expected of boards today, in this age of transparency and accountability, and our citizen volunteers rise to the challenge. AGB provides its membership with the tools and expertise to deliver on these increasingly high expectations.

Volunteering is important not only for the institution but also for the volunteer. So often in our day to day work, things become routine or are so hectic that you ask yourself, "What impact did I have today?" or "Am I making a difference?" Knowing you've made a difference energizes you no matter how hard you might be working. In volunteering, especially for something you are passionate about, this is a gift you receive. Whether mentoring a young person or working to generate scholarship funds and seeing the impact on a student who might not otherwise be able to complete their education, there is nothing better. Often when I have volunteered for an organization, I feel that I get back much more than I give.

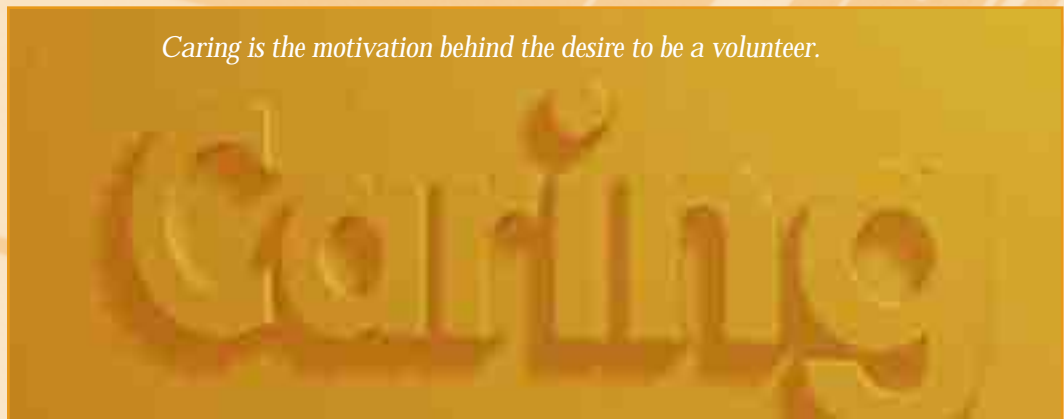
—Joyce Roché, board chair, Dillard University; president and CEO, Girls Inc.

Volunteerism is the glue which holds together everything of lasting value in America. Especially in higher education, volunteer board members, alumni, friends, and students give testament to the hope that the education of the whole person will encourage them to give back for the well-being of humanity.

—Jake Schrum, president, Southwestern University

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*Caring is the motivation behind the desire to be a volunteer.*



# The Year in REVIEW

AGB's record of service since 1921 has demonstrated our commitment to supporting and strengthening the relationship between volunteer boards and institution administrators in order to strengthen higher education and to meet the educational needs of students, states, and the nation. In these challenging times, the relationship between board and Chief Executive has grown even more central; in response, AGB's agenda is focused on strengthening the academic presidency and establishing strategic and collaborative working relationships.

Last year, higher education faced a number of significant challenges. Two specific forces had the most immediate impact. Last July, after several years of delay, Congress reauthorized the Higher Education Act, traditionally seen as the cornerstone for federal student aid. While largely a positive outcome, the reauthorized act includes well over 100 new regulations for colleges and universities, and details of a number of the act's provisions have yet to be determined.

*AGB's agenda is focused on strengthening the academic presidency and establishing strategic and collaborative working relationships.*

But the big story in the last year and for months and perhaps years to come, was the economic crisis besetting the nation. We are clearly in new territory, witnessing an economy that is taking colleges and universities on an unpredictable ride. Double-digit endowment losses at institutions have led to hiring freezes, travel bans, delays in building projects, and other cost-cutting moves at both public and private colleges, with tuition hikes and more requests for financial aid following immediately after.

Even as Congress debates expanded investment in higher education and strategies to make it more broadly available, ongoing threats to institutional autonomy and self-regulation will likely remain areas of concern to governing boards. Issues of new regulatory requirements, cost oversight, and mandated endowment spending warrant continued attention, as does the aggressive monitoring of higher education governance by the Internal Revenue Service.

As higher education confronts the challenges created by the current economic storm, as well as the established needs of improved access, affordability and degree attainment, the work of boards is becoming more central, more important, more visible. AGB is focusing its work on these critical challenges, with overarching attention to accountable governance.

In 2008, AGB demonstrated its commitment to excellence through its service to its members and corporate partners. AGB facilitated change at the institution level, serving boards directly through Board Education and Consulting Services (BECS), meetings, and other programs. Here are highlights of AGB's work on your behalf:

We try to impress on all students that their studies should prepare them, not just to make a living, but to make lives of purpose, characterized by an ethos of service that uplifts those around them. This begins with volunteerism and philanthropy in the college years. Through the host of students we empower to make a difference in the lives of those whom they touch, the ripples of their deeds will spread to the ends of the earth.

—Bobby Fong, president, Butler University

**Presidential Leadership.** AGB launched a new service to conduct *comprehensive presidential assessments*, which member boards are urged to *undertake every three to five years*. AGB assisted five institutions conduct assessments in 2008. AGB's comprehensive assessment process can help a chief executive address critical issues, refresh personal and institutional priorities, and become more effective as a leader while also helping the board in its role of supporting and evaluating the president and improving its own performance. The service is designed to strengthen presidential leadership and benefit the institution's or system's overall strategic direction.

**The Center on Public Trusteeship and Governance** continued to provide statewide solutions to public higher education governance issues. Since 2004, the center and the Texas Higher Education Coordinating Board have worked together to *identify best practices in system and campus governance for Texas institutions in order to meet the need to increase student participation and success in higher education*. This collaborative effort, supported by funding from the Lumina Foundation for Education and the Houston Endowment, Inc., was fueled by work in Texas to close educational gaps by focusing on the critical areas of participation, success, excellence, and research. A full report was published at the end of 2008. Also, the Center worked with the Louisiana Board of Regents to develop and staff an advisory group on updating the state master plan for higher education. AGB Senior Vice President Rich Novak staffed the working group on board development, which made its recommendations in June to the regent's staff and full advisory group. It contained recommendations on board selection and statewide board orientation and education.

**Board Policy and Practices.** AGB's Board Education and Consulting Service (BECS) continues to engage boards and institutional leadership. BECS entered into a consultancy with the Board of Regents at Seton Hall University to facilitate and oversee a *detailed review of the board's policies and practices* with the goal of becoming more strategic in its structure and its work. AGB helped the board look at best practices and devised strategies for becoming more engaged. The board also

modified its structure and crafted new descriptions of board committees, including an updated charge for each standing committee. From the perspective of the president, board leadership, and AGB, this consultancy succeeded by developing a clear set of desired outcomes backed up by a detailed plan of work, and ensuring broad participation and buy-in.

**Governance Needs of Historically Black Colleges and Universities (HBCUs).** AGB is partnering with the United Negro College Fund (UNCF) on a special *Trusteeship Institute* for presidents and board chairs of independent HBCUs. The program is based on AGB's successful Institute for Board Chairs and Presidents, which brings together leadership teams of chief executives and board chairs of independent colleges and universities to help them strengthen their working relationships and to develop an action plan for strengthening their boards. Scheduled for June 2009, the program is designed to enhance the leadership and governance of these institutions that are so important to the fabric of American higher education.

**Analyzing College Costs.** Along with three other AGB-member institutions, The College of New Jersey, led by its president Barbara Gitenstein, a member of AGB's Council of Presidents, participated in the year-long pilot phase of AGB's *College Cost Project*. Aimed at connecting college costs to governing board responsibilities for public accountability and funded by the Woodruff Foundation, the project engaged board leaders and the senior leadership teams of four colleges located in Maryland, Kentucky, North Carolina, and New Jersey. The pilot project was designed to improve the quality of board-level monitoring of college costs—expenses—particularly as related to the board's role in overseeing the institution's strategic direction. Results of the project are being shared through publications and a "toolkit" for making board conversations practical and beneficial. The Cost Project will initiate and sustain collaboration between governing boards, senior leadership, and interested constituents in the quest for transparency, clarity, and accountability around critical financial issues.

# 2008 Meetings

AGB's annual Fall Workshop was devoted to "Financial Strategies in an Uncertain Economy." Held in Baltimore in November, this meeting drew 125 participants representing 62 institutions for two days of programming on topics including: The IRS Form 990, benchmarking and comparative indicators, and college costs.

AGB launched a new product line of webinars in order to get information out on important topics quickly and efficiently:

- *Law and Ethics: A Webinar for New Trustees of Independent Colleges and Universities* with Tom Hyatt, partner, Sonnenschein, Nath & Rosenthal;
- *Making Time for Board Education* with Thomas C. Longin, consultant to governing boards, trustee of Carroll College (MT), former vice president for programs and research at AGB, and former provost of Ithaca College;
- *The Current Economic Crisis: Fundamental Financial Issues for College and University Foundations* with Lisa Eslinger, vice president for Finance and Operations of the Iowa State University Foundation, and Judith Van Gorden, senior vice president and chief financial officer of the Arizona State University Foundation;
- *Endowments and Investments: Current Challenges for Foundation Investment Committees, CEOs, and Investment Staff* with John Griswold, executive director, Commonfund Institute;
- *The Impact of the Current Financial Crisis on Higher Education Philanthropy* with Dr. Eugene R. Tempel, president of the Indiana University Foundation and former executive director of the Center on Philanthropy at Indiana University.

The 2008 National Conference on Trusteeship, held April 13-15 in Boston, attracted record participation, with nearly 1,000 registrants. The conference kicked off with a speech by noted historian and public intellectual Michael Beschloss, who discussed examples of leaders and leadership relevant to colleges and the corporate world. Juan Williams, author and senior correspondent for National Public Radio's "Morning Edition" and a trustee of Haverford College, delivered a plenary speech on public perceptions of higher education and the changing student population. Erroll Davis, chancellor of the 35-institution University System of Georgia, spoke on his transition from corporate CEO to leader of the 260,000-student system. A panel on college costs featured Jane Wellman, independent consultant and researcher in United States higher education and public policy and executive director of the Delta Project on Postsecondary Costs, Productivity, and Accountability; Alison Bernstein, Ford Foundation vice president for the Education, Media, Arts, and Culture Program and board member of Bates College; Travis Reindl, former program director at Jobs for the Future; and Peter McGrath, the College Board. And a panel of experts on international education spoke about national interests and engagement in international education.



Expert panel addresses access, price, quality, and productivity: L-R Travis Reindl, Jobs for the Future; Alison Bernstein, Ford Foundation; Rick Legon, AGB; Jane Wellman, Delta Project; Peter McGrath, College Board



Bridging Two Worlds: L-R Erroll Davis, University System of Georgia and keynote; Susan Johnston, AGB; and Jim Weaver, Gettysburg College and AGB board member



World View: L-R Jamil Salmi, World Bank; Philip Fine, University World News; Supachai Yavaprabhas, SEAMEO; and moderator Rick Skinner, AGB

The 2008 Foundation Leadership Forum in Newport Beach, California, had a record attendance of 340 foundation executives and board members, an increase of nine percent over 2007 attendance. This annual program provides foundation chief executives, board chairs, committee chairs, and other board leaders the opportunity to exchange ideas, interact with nationally recognized professionals and policy analysts, and explore ways for improving the performance of the foundation board. AGB has served this group of higher education leaders since 1997.

*AGB has been vital to our efforts to start a new philanthropic foundation. We decided to work with an AGB Consultant, who brings the full force and expertise of AGB to us.* —JACK B. JEWETT, VICE PRESIDENT FOR UNIVERSITY ADVANCEMENT, CALIFORNIA STATE UNIVERSITY, MONTEREY BAY, AND SECRETARY, AGB BOARD OF DIRECTORS

Strategy

The 2009 National Conference on Trusteeship was held April 18–21, 2009, at the Sheraton San Diego Hotel and Marina. Plenary speakers included Richard Chait, director of the Study of New Scholars Program at the Harvard Graduate School of Education, on leading in uncertain times; William Freund, chief economist emeritus, New York Stock Exchange, speaking on “Your Institution in a Global Economy”; Graham Spanier, president of Pennsylvania State University and chair, National Security Higher Education Advisory Board, and John S. Pistole, deputy director, FBI, speaking on “Higher Education and National Security”; Kai Ryssdal, host of American Public Media’s *Marketplace*, speaking on “Higher Education in a Changed Marketplace”; and a panel discussion including William “Brit” Kirwan, chancellor, University of Maryland System, Lee Pelton, president, Willamette University, Charles Reed, chancellor, California State University System, Beverly Tatum, president, Spelman College, Juliet Garcia, president, University of Texas-Brownsville/ Texas Southmost College, and Elson Floyd, president, Washington State University, on the topic of “What Presidents Need from Boards in Uncertain Times.”

The University’s Board of Regents initiated a consultancy with AGB to lead a detailed review of the board’s policies and practices with the goal of becoming more strategic in its deliberations and activity. AGB proposed looking at best practices of strategic governance and devising strategies for becoming a “high performing” board, providing a workshop on strategic governance that resulted in modifying the structure of the board, as well as in crafting new descriptions of board committees including charges to each committee that took into consideration the combined vision for governance articulated by the president and board leadership.

—Msgr. Robert Sheeran, president, Seton Hall University

# Member Services, Research Initiatives, and Advocacy

AGB has continued, throughout 2008, to strengthen its work, its visibility, and its value to members by focusing on our strengths: member services, research, and advocacy.

- **The IRS Compliance Project**, a partnership between AGB and the National Association of College and University Business Officers (NACUBO), will analyze the data that some 400 institutions were recently requested to submit to the IRS concerning such topics as student demographics, endowment spending, compensation of CEOs and senior management, unrelated business income tax (UBIT), athletics, and the reporting and characterization of activities on the IRS Form 990-T. AGB also sponsored a webinar, *The IRS's New Form 990: New Governance Roles for Trustees of Colleges and Universities*.
- **The Center for Public Trusteeship and Governance and the University of Virginia's Miller Center of Public Affairs** convened a two-day meeting to discuss policy reform in higher education. The meeting resulted in a report, *Aligning American Higher Education with a 21<sup>st</sup> Century Public Agenda: A Leadership Approach to Policy Reform*. Funded in part by the Carnegie Corporation of New York, the meeting and resulting paper offered several recommendations for governing boards, chief executives, and state policy makers to ensure that institutions of higher education are led effectively during these challenging times. A follow-up meeting in Atlanta brought together state legislators, legislative staff, and trustees to discuss using the report as a springboard for prioritizing institutional ambitions within the current economic context.
- **The AGB Board of Directors' Committee on Intercollegiate Athletics** approved draft policy language for presidents and boards that was developed following a July meeting with representatives from the National Collegiate Athletic Association (NCAA), institution presidents, and board members. The formal policy language will supplement AGB's *Statement on Board Responsibility for Intercollegiate Athletics*, first published in 2004 and revised in 2007.
- AGB continued its **advocacy and engagement** throughout the year on public policy matters that affect higher education governance. Among its actions:
  - ~ AGB issued an **alert** in February, in coordination with the American Council on Education, the National Association of College and University Business Officers (NACUBO), and the Council for the Support and Advancement of Education, *calling for immediate action to block a House Amendment (H.R. 4137) to impose minimum endowment spending requirements* on all colleges and universities; the amendment was later withdrawn.
  - ~ AGB issued an **alert** in June concerning the reauthorization of the Higher Education Act, urging board members to contact their Congressional representatives concerning provisions of the bill related to *accreditation*, which lies at the heart of a board's responsibility to protect institutional autonomy, as well as other provisions affecting self-regulation, cost, and affordability.
  - ~ AGB participated in the **Congressional Roundtable on College Costs and Endowments** called by U.S. Sen. Charles Grassley (R-IA) and U.S. Rep. Peter Welch (D-VT), in September concerning *endowment spending rates and university tax-exempt status*.

There is no doubt that volunteering and community service are invaluable to our universities and to communities across our nation. Study after study has revealed that students who are engaged, who perform some type of service while in college, graduate in higher numbers and continue their civic engagement activities throughout their lives. ...Even in these times of fiscal uncertainty, we need to remain steadfast in our support of the volunteer and service programs in our universities and our country.

—Charles B. Reed, chancellor, California State University

*As Congress and the IRS take a very keen interest in foundations and in ways to hold foundations accountable, having an AGB consultant helps us anticipate issues that may not have been issues a few years ago.*—JACK B. JEWETT, VICE PRESIDENT FOR UNIVERSITY ADVANCEMENT, CALIFORNIA STATE UNIVERSITY, MONTEREY BAY, AND SECRETARY, AGB BOARD OF DIRECTORS

The useful part of AGB is the outside perspective, the strong understanding of the principles of governance, and the feedback that was independent of the community. In the area of coaching presidents and boards, I think the outside view AGB provides allows for new dialogue and education.

—Elizabeth Ballantine, Board Chair, Grinnell College and member, AGB Board of Directors

# Additional Resources for Members

## BOARD EDUCATION AND CONSULTING SERVICES (BECS)

AGB's Board Education and Consulting Services (BECS) expanded its service to boards by developing a consulting arm, including three new consulting services this past year: **Comprehensive Presidential Assessment**; **Achieving High-Performing Boards**; and **Board Oversight of Intercollegiate Athletics**. During the past year, BECS has served colleges, universities, and university foundations by providing higher education governance workshops and consulting engagements addressing a wide range of issues, including: annual president/chancellor assessment; board self assessment; governing board roles and responsibilities; foundation board and governing board relationships; leadership transition; new trustee orientation; preparing for a presidential search; (combined) presidential and board assessment; strategic governance; strategic planning; and strengthening president and board relations. *For additional information on AGB's Board Education and Consulting Services, contact [becs@agb.org](mailto:becs@agb.org).*

## ZWINGLE LIBRARY AND RESOURCE CENTER



The **J. L. Zwingle Library and Resource Center** continues to attract considerable membership use. During FY'08, ZRC staff responded to approximately 2,500

requests for information, ranging from questions about governance and leadership to very specific topics of interest. Inquiries from Board Professionals made up half of all requests. The research database, searchable online by members, now consists of 12,000 holdings and is a basic member service. *Members can obtain expert assistance by calling or e-mailing the Zwingle Library and Resource Center at 202-776-0818 or [ZRC@agb.org](mailto:ZRC@agb.org).*

## PUBLICATIONS



**Trusteeship**, AGB's bi-monthly magazine, reports trends, issues, and practices in higher education and its governance to help board members and chief executives better

understand their distinctive and complementary roles and to strengthen board performance. The magazine underwent a significant redesign in fall 2007, and in 2008 it received a Gold EXEL Award from the Society of National Association Publications (SNAP), winning the top award for redesign of a publication with up to 50,000 circulation. *Trusteeship* is under new editorial management with the addition of Cheryl Fields, an accomplished professional writer and editor with many years at the *Chronicle of Higher Education* and *Change* magazine, as well as a new editorial staff.

**AGB Press**, established two years ago as part of the implementation of the association's most recent strategic plan, had another strong year, publishing several new books, additions to the popular Board Basics series, and other publications covering a range of topics to help boards, trustees, and senior administrators understand the complexities of higher education governance.

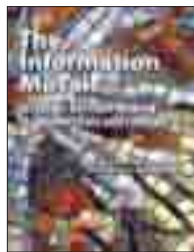
**NEW PUBLICATIONS THIS YEAR**



**Sounding Boards: Advisory Councils in Higher Education**  
(Michael J. Worth)



**New Ethics of Trusteeship: How Public College and University Trustees Can Meet Higher Public Expectations**



**The Information Mosaic: Strategic Decision Making for Universities and Colleges**  
(Gerald W. McLaughlin and Josetta McLaughlin)



An updated **Presidential Search Package**



**Presidential Compensation in Higher Education: A Guide for Governing Boards**  
(Robert H. Atwell, forward by Martin Michaelson)

**Several New Board Basics**



**A Glossary of Financial Terms; Endowment Management; Strategic Budgeting**



**Understanding Financial Statements: A Strategic Guide for Independent College & University Boards, 2nd ed.**  
(John A. Mattie, John H. McCarthy, and Robert M. Turner, edited by Sandra L. Johnson)



**A Guide to Updating the Board's Conflict of Interest Policy**

# Finances

## FINANCES

For the fiscal year ending June 30, 2008, general operating revenues (including transfer from the Quasi-Endowment Fund and net assets released from grant restrictions of \$905,043) totaled \$8,599,767. Dues from member boards provided approximately 52 percent of AGB's general operating revenues prior to the release of assets from grant restrictions. Dues accounted for 48 percent of revenues from all sources, which included new grant revenues of \$631,216 in support of special programs.

As of June 30, 2008, net assets were \$8,153,538, compared with \$8,690,545 on June 30, 2007. Total assets were \$12,355,370 (including reserves of \$6,214,137 at fair market value), compared with total assets of \$11,918,317 on June 30, 2007.

## ASSOCIATION OF GOVERNING BOARDS

Statement of Activities for the year ending June 30, 2008

	Operating Fund	Other Unrestricted	Temporarily Restricted	TOTAL
<b>Revenues and other support</b>				
Membership dues	\$3,985,586			\$3,985,586
Conference/workshops; board education consulting services; benchmarking services	2,492,193			2,492,193
Publication sales	385,980			385,980
Grants and gifts	173,168		\$631,216	804,384
Contributed services			71,900	71,900
Center services/other income	372,797	(45,598)	6,339	333,538
<b>Total revenues</b>	<b>7,409,724</b>	<b>(45,598)</b>	<b>709,455</b>	<b>8,073,581</b>
Transfer from QEF	285,000			285,000
Net assets released from restrictions	905,043	328,501	(1,233,544)	0
<b>Total revenues and other support</b>	<b>8,599,767</b>	<b>282,903</b>	<b>(524,089)</b>	<b>8,358,581</b>
<b>Expenses and allocations</b>				
Programs and research	3,071,548	37,500		3,109,048
Richard T. Ingram Center	306,072	59,422		365,494
Central administration	2,086,397	170,438		2,256,835
Publications	1,118,749	63,607		1,182,356
Membership development	384,067	13,370		397,437
Marketing	231,992	7,500		239,492
Resources development	169,572	6,522		176,094
Restricted grants program	833,143			833,143
Other unrestricted programs		50,689		50,689
<b>Total expenses before allocations</b>	<b>8,201,540</b>	<b>409,048</b>	<b>0</b>	<b>8,610,588</b>
Transfer from QEF		285,000		285,000
<b>Total expenses and allocations</b>	<b>8,201,540</b>	<b>694,048</b>	<b>0</b>	<b>8,895,588</b>
<b>Changes in net assets</b>	<b>398,227</b>	<b>(411,145)</b>	<b>(524,089)</b>	<b>(537,007)</b>
Transfers	(92,265)	92,265	0	0
Net assets, beginning of year	109,482	7,683,409	897,654	8,690,545
<b>Net assets, end of year</b>	<b>\$415,444</b>	<b>\$7,364,529</b>	<b>\$373,565</b>	<b>\$8,153,538</b>

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AGB's fundraising efforts generate three types of revenue: restricted program grants for projects, restricted operating grants earmarked for particular programs (such as conference sponsorship), and unrestricted grants for general support. AGB received support between July 1, 2007 and June 30, 2008, from the following donors and sponsors.

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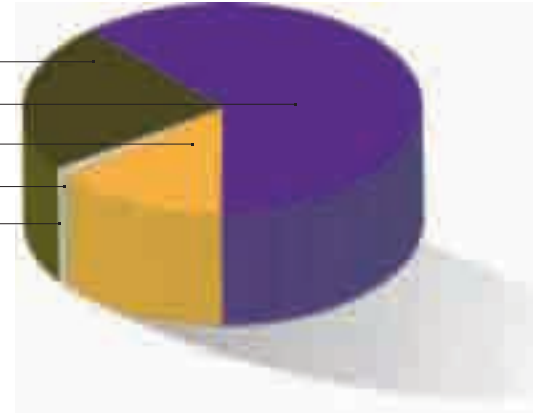
## MEMBERSHIP PROFILE

AGB is proud of its consistently high membership-renewal rate. Nearly 97 percent of current member boards retain their AGB memberships from one year to the next. The following profile of the membership shows the types of boards and individuals among our members.

As of 06/30/08:

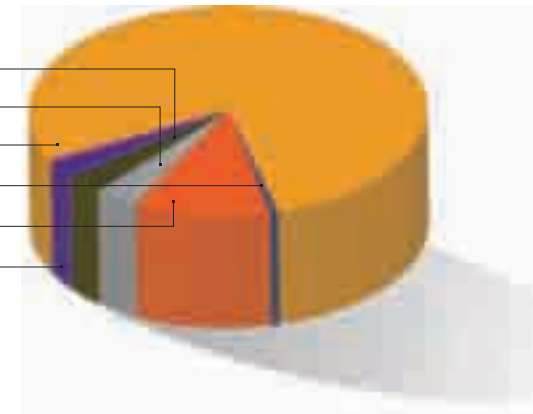
### Member Boards by Type of Institution

Gov boards of public colleges and universities	289
Gov boards of independent colleges and universities	775
Foundations	175
Statewide coordinating boards	8
Other private boards	6
<b>Total Membership</b>	<b>1,253</b>



### Membership by Type of Individual

	PUBLIC	INDEPENDENT	TOTAL
Presidents & Chancellors	358	755	1,113
Board chairs	426	724	1,150
Trustees & regents	7,249	20,916	28,165
Directors of foundations	175		175
Senior administrators	1,144	2,893	4,037
Board professional staff	462	767	1,229
<b>Total</b>	<b>9,814</b>	<b>26,055</b>	<b>35,869</b>



## AGB-Member Institutions in 2008

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Huntingdon College  
Samford University  
Spring Hill College  
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California State University—Northridge Foundation  
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 Southwestern College  
 University of New Mexico  
 University of New Mexico Foundation, Inc.  
 University of the Southwest  
 Western New Mexico University

**NEW YORK**

Adelphi University  
 Alfred University  
 Bank Street College of Education  
 Barnard College  
 Boricua College  
 Borough of Manhattan Community College  
 Canisius College  
 City University of New York  
 Clarkson University  
 Colgate Rochester Crozer Divinity School  
 Colgate University  
 College of Mount Saint Vincent  
 College of Saint Rose  
 College of Westchester  
 Columbia University  
 Cooper Union for the Advancement of Science and Art  
 Cornell University  
 Culinary Institute of America  
 Dominican College of Blauvelt  
 Dowling College  
 D'Youville College  
 Elmira College  
 Erie Community College  
 Erie Community College Foundation, Inc.  
 Excelsior College  
 Fashion Institute of Technology  
 Fordham University  
 Franklin College Switzerland  
 Genesee Foundation  
 Hamilton College  
 Hartwick College  
 Hebrew Union College—Jewish Institute of Religion  
 Hobart and William Smith Colleges  
 Hofstra University  
 Houghton College  
 Iona College  
 Ithaca College  
 Jewish Theological Seminary of America  
 Keuka College  
 Le Moyne College  
 Long Island University  
 Manhattan College  
 Manhattanville College

Marist College  
 Marymount Manhattan College  
 McQuaid Jesuit  
 Medaille College  
 Medgar Evers College  
 Mercy College  
 Molloy College  
 Monroe Community College Foundation  
 Mount Saint Mary College  
 Nazareth College of Rochester  
 New York Chiropractic College  
 New York Medical College  
 Niagara University  
 Nyack College  
 Pace University  
 Paul Smith's College of Arts & Sciences  
 Polytechnic University  
 Pratt Institute  
 Rensselaer Polytechnic Institute  
 Roberts Wesleyan College  
 Rochester Institute of Technology  
 Sarah Lawrence College  
 Siena College  
 Skidmore College  
 St. Bonaventure University  
 St. Francis College  
 St. John Fisher College  
 St. John's University  
 St. Lawrence University  
 St. Thomas Aquinas College  
 Syracuse University  
 Teachers College  
 The College of New Rochelle  
 The New School  
 The Sage Colleges  
 Trinity School  
 Union College  
 Union Theological Seminary  
 Utica College  
 Vassar College  
 Vaughn College of Aeronautics and Technology  
 Wagner College  
 Yeshiva University

**NORTH CAROLINA**

Appalachian State University Foundation, Inc.  
 Barton College  
 Brevard College  
 Cabarrus College of Health Sciences  
 Catawba College  
 Davidson College  
 Duke University  
 East Carolina University  
 East Carolina University Foundation, Inc.  
 Elizabeth City State University  
 Elon University  
 Fayetteville State University  
 Guilford College  
 Johnson C. Smith University  
 Lees-McRae College  
 Livingstone College  
 Meredith College  
 Methodist University  
 North Carolina A&T State University  
 North Carolina Central University  
 North Carolina Central University Foundation, Inc.  
 North Carolina School of the Arts  
 North Carolina State University  
 North Carolina Wesleyan College  
 Peace College  
 Rowan-Cabarrus Community College  
 Salem Academy & College  
 University of North Carolina—Asheville  
 University of North Carolina—Chapel Hill  
 University of North Carolina—Charlotte  
 University of North Carolina—Charlotte Foundation, Inc.  
 University of North Carolina—Greensboro  
 University of North Carolina—Pembroke

University of North Carolina—Wilmington  
 University of North Carolina at Chapel Hill Endowment  
 University of North Carolina System  
 Wake Forest University  
 Warren Wilson College  
 Western Carolina University  
 Western Carolina University Foundation  
 Winston-Salem State University

**NORTH DAKOTA**

Bismarck State College Foundation  
 Jamestown College  
 North Dakota University System

**OHIO**

Antioch University  
 Ashland University  
 Aultman College of Nursing and Health Sciences  
 Baldwin-Wallace College  
 Bowling Green State University  
 Bowling Green State University Foundation, Inc.  
 Capital University  
 Case Western Reserve University  
 Cedarville University  
 Central Ohio Technical College  
 Central State University  
 Cleveland State University  
 Cleveland State University Foundation, Inc.  
 College of Mount St. Joseph  
 College of Wooster  
 Columbus College of Art & Design  
 Cuyahoga Community College District Deance College  
 Denison University  
 Franciscan University of Steubenville  
 Franklin University  
 Heidelberg College  
 Hiram College  
 John Carroll University  
 Kent State University  
 Kent State University Foundation  
 Kenyon College  
 Lake Erie College  
 Lourdes College  
 Malone College  
 Marietta College  
 MedCentral College of Nursing  
 Mercy College of Northwest Ohio  
 Methodist Theological School in Ohio  
 Miami University  
 Miami University Foundation  
 Mount Union College  
 Mount Vernon Nazarene University  
 Muskingum College  
 Northeastern Ohio Universities College of Medicine  
 Northeastern Ohio Universities College of Medicine Foundation  
 Oberlin College  
 Ohio Board of Regents  
 Ohio Dominican University  
 Ohio Northern University  
 Ohio State University  
 Ohio State University Foundation  
 Ohio University  
 Ohio Wesleyan University  
 Otterbein College  
 Owens Community College Foundation  
 Shawnee State University  
 Sinclair Community College Foundation  
 The University of Akron  
 The University of Findlay  
 The University of Toledo  
 Union Institute & University  
 University of Cincinnati  
 University of Cincinnati Foundation  
 University of Dayton  
 University of Northwestern Ohio  
 University of Rio Grande  
 University of Toledo Foundation

Urbana University  
Ursuline College  
Walsh University  
Wilberforce University  
Wilmington College  
Wittenberg University  
Wright State University  
Wright State University Foundation, Inc.  
Xavier University  
Youngstown State University

#### OKLAHOMA

Board of Regents for OSU/A&M Colleges  
Oklahoma City University  
Oklahoma State Regents for Higher Education  
Oklahoma State University Foundation  
Oral Roberts University  
Saint Gregory's University  
Southern Nazarene University  
University of Central Oklahoma Foundation  
University of Oklahoma  
University of Oklahoma Foundation, Inc.  
University of Science & Arts of Oklahoma  
University of Tulsa

#### OREGON

Lewis and Clark College  
Lincoln College  
Northwest Christian University  
Oregon Health & Science University Foundation  
Oregon State University Foundation  
Oregon Tech Foundation  
Oregon University System  
Paci c University  
Portland State University Foundation  
Reed College  
University of Oregon Foundation  
University of Portland  
Western States Chiropractic College  
Willamette University

#### PENNSYLVANIA

Albright College  
Allegheny College  
Alvernia University  
Arcadia University  
Bloomsburg University of Pennsylvania  
Bryn Mawr College  
Bucknell University  
Bucks County Community College  
Cabrinri College  
California University of Pennsylvania  
Carlow University  
Carnegie Mellon University  
Cedar Crest College  
Chatham University  
Chestnut Hill College  
Cheyney University Foundation  
Community College of Allegheny County Educational Foundation  
Delaware Valley College  
DeSales University  
Dickinson College  
Drexel University  
Duquesne University  
East Stroudsburg University Foundation, Inc.  
Edinboro University Foundation  
Edinboro University of Pennsylvania  
Elizabethtown College  
Evangelical Theological Seminary  
Franklin and Marshall College  
Gannon University  
Gettysburg College  
Gwynedd-Mercy College  
Harrisburg University of Science & Technology

Haverford College  
Holy Family University  
Immaculata University  
Indiana University of Pennsylvania  
Juniata College  
Kutztown University Foundation  
Kutztown University of Pennsylvania  
La Roche College  
Lackawanna College  
Lafayette College  
Lancaster Gen. Coll. of Nursing & Health Sciences  
Lebanon Valley College  
Lehigh University  
Lincoln University  
Lutheran Theological Seminary at Philadelphia  
Lycoming College  
Mansfield University of Pennsylvania  
Mercyhurst College  
Messiah College  
Millersville University Foundation  
Montgomery County Community College  
Moore College of Art & Design  
Moravian College  
Mount Aloysius College  
Muhlenberg College  
Neumann College  
Northampton Community College  
Pennsylvania College of Art & Design  
Pennsylvania Institute of Technology  
Pennsylvania State System of Higher Education  
Pennsylvania State University  
Philadelphia Biblical University  
Philadelphia University  
Point Park University  
Robert Morris University  
Rosemont College  
Saint Francis University  
Saint Joseph's University  
Saint Vincent College  
Salus University  
Seton Hill University  
Shippensburg University Foundation, Inc.  
Shippensburg University of PA  
Slippery Rock University Foundation  
Slippery Rock University of Pennsylvania  
St. Charles Borromeo Seminary  
Susquehanna University  
Swarthmore College  
Temple University  
Thiel College  
University of Pennsylvania  
University of Pittsburgh  
University of Scranton  
University of the Sciences in Philadelphia  
Ursinus College  
Villanova University  
Washington and Jefferson College  
Westminster College  
Widener University  
Wilkes University  
Wilson College

#### PUERTO RICO

Ana G. Mendez University System  
Inter American University of Puerto Rico  
Pontifical Catholic University of Puerto Rico  
San Juan Bautista School of Medicine  
Universidad Central de Bayamon  
Universidad Central Del Caribe  
Universidad de Carlos Albizu  
Universidad Politecnica-Puerto Rico  
University College of San Juan  
University of Puerto Rico

University of the Sacred Heart

#### RHODE ISLAND

Brown University  
Bryant University  
Johnson and Wales University  
Providence College  
Rhode Island Board of Governors for Higher Education  
Rhode Island School of Design  
Roger Williams University  
Salve Regina University  
University of Rhode Island Foundation

#### SOUTH CAROLINA

Benedict College  
Citadel Foundation  
Cla in University  
Clemson University  
Coastal Carolina University  
Coastal Educational Foundation  
College of Charleston  
College of Charleston Foundation  
Converse College  
Furman University  
Limestone College  
Medical University of South Carolina  
Medical University of South Carolina Foundation  
Morris College  
Newberry College  
Presbyterian College  
Sherman College of Straight Chiropractic Inc.  
South Carolina State University  
Spartanburg Methodist College  
The Citadel  
University of South Carolina  
University of South Carolina Educational Foundation  
Winthrop University  
Winthrop University Foundation  
Wofford College

#### SOUTH DAKOTA

Augustana College Sioux Falls  
Dakota Wesleyan University  
Mount Marty College  
Presentation College  
South Dakota Board of Regents  
South Dakota State University Foundation  
University of South Dakota Foundation

#### TENNESSEE

Belmont University  
Christian Brothers University  
Cumberland University  
Fisk University  
Johnson Bible College  
Lane College  
LeMoyn-Owen College  
Lincoln Memorial University  
Martin Methodist College  
Maryville College  
Meary Medical College  
SEWANEE: The University of the South  
Southern College of Optometry  
Tusculum College  
University of Tennessee-System Of ce  
Vanderbilt University

#### TEXAS

Abilene Christian University  
Alamo Community College District  
Alvin Community College  
Austin College  
Baylor University  
College of the Mainland  
Dallas County Community College District  
El Paso Community College District  
Houston Community College System

Jarvis Christian College  
McMurry University  
Midwestern State University  
Our Lady of the Lake University  
Parker College of Chiropractic  
Rice University  
Schreiner University  
South Texas College of Law  
Southern Methodist University  
Southwestern University  
St. Edward's University  
St. Mary's University  
Texas A&M Foundation  
Texas Chiropractic College  
Texas Christian University  
Texas Higher Education Coordinating Board  
Texas Lutheran University  
Texas Southern University  
Texas Southmost College  
Texas Tech Foundation, Inc.  
Texas Tech University System  
Texas Woman's University  
The Texas A&M University System  
Tyler Junior College Foundation  
University of Dallas  
University of Houston System  
University of North Texas Foundation, Inc.  
University of North Texas System  
University of St. Thomas  
University of Texas System  
Wharton County Junior College  
Wiley College

#### UTAH

University of Utah  
Utah State University  
Utah State University Foundation  
Utah System of Higher Education  
Utah Valley State College  
Western Governors University  
Westminster College

#### VERMONT

Bennington College  
Champlain College  
Goddard College  
Landmark College  
Middlebury College  
Norwich University  
Saint Michael's College  
Southern Vermont College  
University of Vermont  
Vermont College of Fine Arts  
Vermont Law School

#### VIRGIN ISLANDS

University of the Virgin Islands

#### VIRGINIA

Averett University  
Bluefield College  
Bridgewater College  
Christopher Newport University  
College of William & Mary  
College of William & Mary Foundation  
Eastern Virginia Medical School  
Emory & Henry College  
George Mason University  
Hampden-Sydney College  
Hampton University  
Hollins University  
James Madison University  
Longwood University  
Longwood University Foundation, Inc.  
Lynchburg College  
Mary Baldwin College  
Marymount University  
Norfolk State University  
Norfolk State University Foundation, Inc.

Northern Virginia Community College  
Educational Foundation Inc.  
Old Dominion University  
Old Dominion University Educational Foundation  
Radford University  
Randolph College  
Randolph-Macon College  
Roanoke College  
Shenandoah University  
Sweet Briar College  
Tidewater Community College  
Union Theological Seminary & PSCE  
University of Mary Washington  
University of Mary Washington Foundation  
University of Richmond  
University of Virginia  
University of Virginia Darden School Foundation  
University of Virginia Law School Foundation & Alumni Association  
Virginia Commonwealth University  
Virginia Community College System  
Virginia Polytechnic Institute & State University  
Virginia State University  
Virginia Tech Foundation, Inc.  
Virginia Union University  
Virginia Wesleyan College  
VMI Foundation, Inc.  
Washington and Lee University

#### WASHINGTON

Central Washington University  
Central Washington University Foundation  
City University  
Eastern Washington University  
Gonzaga University  
Heritage University  
Lakeside School  
Paci c Lutheran University  
Saint Martin's University  
Seattle Paci c University  
Seattle University  
The Evergreen State College Foundation  
Trinity Lutheran College  
University of Puget Sound  
University of Washington  
Washington State University  
Washington State University Foundation  
Western Washington University  
Whitworth University

#### WEST VIRGINIA

Alderson-Broaddus College  
Bethany College  
Davis & Elkins College  
Fairmont State University  
Marshall University Foundation, Inc.  
Shepherd University  
University of Charleston  
West Liberty State College Foundation  
West Virginia State University  
West Virginia University Foundation  
West Virginia Wesleyan College  
Wheeling Jesuit University

#### WISCONSIN

Alverno College  
Beloit College  
Cardinal Stritch University  
Carthage College  
Edgewood College  
Lakeland College  
Marquette University  
Milwaukee Institute of Art & Design  
Mount Mary College  
Ripon College

Sacred Heart School of Theology  
Silver Lake College  
St. Norbert College  
University of Wisconsin  
University of Wisconsin Foundation  
University of Wisconsin-Eau Claire Foundation, Inc.  
Viterbo University

#### WYOMING

University of Wyoming  
University of Wyoming Foundation

#### INTERNATIONAL

##### ASIA

Southeast Asian Ministers of Education Regional Center for Higher Education  
United Board for Christian Higher Education in Asia

##### AUSTRALIA

University of Ballarat  
Canada  
Acadia University  
Athabasca University  
Canadian Memorial Chiropractic College  
Carleton University  
Concordia University  
Grant MacEwan College  
Kwantlen University College  
La Fondation de l'Université Laval  
McGill University  
Memorial University of Newfoundland  
Mount Royal College  
Royal Roads University  
Simon Fraser University  
Trinity Western University  
University of Alberta  
University of Manitoba  
University of Northern British Columbia  
University of Saskatchewan  
University of Toronto  
University of Victoria  
Vancouver Island University  
William & Catherine Booth College

##### EGYPT

American University in Cairo

##### FRANCE

American University of Paris

##### GREECE

The American College of Greece

##### GUAM

University of Guam

##### ITALY

The American University of Rome

##### KOREA

Chungkang College of Cultural Industries

##### LEBANON

American University of Beirut  
Lebanese American University

##### MARSHALL ISLANDS

College of the Marshall Islands

##### MEXICO

Universidad de Monterrey

##### NIGERIA

American University of Nigeria

##### PAKISTAN

Aga Khan University

##### SAUDI ARABIA

Dar Al-Hekma College

##### SWITZERLAND

Franklin College Switzerland

##### UNITED ARAB EMIRATES

American University of Sharjah