



# One Cause...Forever



# One Cause...Forever

## Supporting Ball State University

Dear alumni and friends of Ball State University,

This year has been a time of celebration tempered by economic and financial challenges.

We have had tremendous success with the largest capital campaign in Ball State's history. At the end of our fiscal year, June 30, 2009, the Ball State Bold: Investing in the Future capital campaign had raised more than \$174 million of the \$200 million goal. Of that total, more than \$52 million was raised with planned gifts by the foundation, exceeding the original goal of \$50 million.

Through the hard work of our board members and staff, we have completed many of the objectives of the foundation's *Strategic Plan 2007–2012*. Great strides have been made in the areas of staff development, investment management, building a culture of fundraising, integration of the Operational Plan, communications, and creating student immersive learning experiences. In addition, we have implemented two major accounting pronouncements and devoted time and resources to comply with the Uniform Prudent Management of Institutional Funds Act (UPMIFA). (Please see the financial section for details about Statement of Financial Accounting Standards 157 and 117-1 as well as UPMIFA compliance.)

We are proud of the work of our Investment Committee, whose members have built a structure that allows us not to just survive but to persevere through these tough economic times. Many organizations were thrust into intense discussions about the soundness of their plans. We were comfortable that we had built a solid strategy, one that could withstand the shocks of 2008 and 2009. While others were forced to reactively change directions, we made necessary adjustments and stayed on a relative course of a long-term investor. Years of planning prepared us for perhaps the most economically challenging fiscal year in our history.

We are pleased to report that Ball State University has a strong partner in the Ball State University Foundation, an organization comprised of individuals focused on our primary mission and one cause forever—supporting Ball State University.

To provide a better understanding of our functions, this annual report explores the foundation's operations and the thoughtful governance and commitment of our valued board of directors. We hope you will find it informative.

We welcome any questions you may have and thank you for your continued support of this great university!



Scheumann Stadium



J. Richard Emens  
Chairman, Board of Directors  
Ball State University Foundation

David W. Bahlmann  
President and CEO  
Ball State University Foundation

# Guiding the Foundation

## FOUNDATION BOARD AND STANDING COMMITTEES

We are proud to be governed by a dynamic group of men and women who make up our board of directors. These volunteers, many of them Ball State graduates, have enjoyed successful careers in the fields of business, finance, law, nonprofit organizations, and communications. With national and international representation, they offer a wealth of experience and wisdom in their service to the foundation and university.

Our board, which meets three times a year, currently has 31 voting members responsible for the broad strategic direction and key policies of the foundation as well as the overall governance and accountability of the organization.

In addition, each board member sits on one or more of the foundation's six standing committees. These committees focus on the foundation's business operations, investments, audit processes, planned and endowed giving operations, and foundation governance. Committee reports are included at each board meeting. Serving on these committees allows board members to make meaningful contributions in their areas of expertise.

## AUDIT COMMITTEE

The role of the Audit Committee is to provide oversight of financial systems and reporting that helps safeguard the assets of the foundation. Outstanding governance characterizes the Ball State University Foundation. An important dimension of this is the presence of effective policies on internal control, ethical conduct, and conflicts of interest—all matters within the scope of the Audit Committee's responsibilities. Additional duties include overseeing the foundation's audit process, reviewing the audit and management letter process, reviewing the Form 990, and recommending potential audit firms to the board of directors.



Stefan Anderson

Committee chairman Stefan Anderson explains the group's work is marked by three principles: independence, accountability, and expertise. "These qualities assure our independent role as representatives for the board of directors," Anderson says in describing the credibility of his committee.

The financial, accounting, and managerial experience of the committee members provides solid grounding for the group's work and ensures the integrity and reliability of the foundation's financial statements and financial management.

"Audit Committee members take pride in the fact that our financial controls and policies consistently receive high grades," says Anderson. "Board directors, the donors, and Ball State expect no less."

## COMMITTEE ON DIRECTORS

In order for the foundation to run successfully, it needs a board of exemplary members. This is why the Committee on Directors is crucial to the organization.

Kent "Oz" Nelson, chairman of the committee, says the group's primary mission is to equip the board with highly qualified

members. The committee has the responsibility to recruit those who "have the skills needed" and "provide a real value to the board."

In addition, the committee helps in the orientation of new board members. This group also recommends a slate of officers for election to the board of directors and evaluates the performance of directors and officers, both individually and collectively.



Kent "Oz" Nelson

"We have been quite successful in recruiting great individuals," Nelson says. "Our committee takes a great concern in doing its work."

Before the recruitment process begins, the Committee on Directors evaluates the makeup of the board. It's important to take a "fresh look" to determine the best possible candidates, says Nelson.

This year, the committee developed a new task force, guided by vice chair Penny Ralston, to review the performance and engagement of the current board members. The task force will also study organizational plans of

other effective organizations in order to make suggestions on incorporating best practices into our organization.

One success of the Committee on Directors can be seen in the diversity of the board, Nelson says. The foundation board used to consist of influential people of Indiana, mostly from the city of Muncie. Now, the foundation has representation at the national and international level with a broader level of experience and excellence from people both inside and outside of the Ball State University network.

Nelson is proud of the depth of talent the committee has recruited. "The results are evident," he says.

## EXECUTIVE COMMITTEE

Primarily comprised of board officers and board committee chairs, the Executive Committee is the administrative arm for the foundation board. It provides counsel and support for the standing board committees and functions as an intake point for emerging issues.

In addition, during the intervals between meetings of the board of directors, the Executive Committee may exercise all powers of the board of directors in the management and direction of the affairs of the organization. This is done in the best interest of the foundation in all cases in which specific directions have not been given by the board of directors.

"The Executive Committee is responsible for the overall management of the foundation when the board of directors is not in session," says chairman J. Richard Emens. "The committee may act on any urgent matter in which time does not permit the calling of a regular or special meeting of the board."



J. Richard Emens

## INVESTMENT COMMITTEE

Being a “foundation of excellence” and “maximizing sustainable support for Ball State University” are two powerful statements that define the cause and responsibilities of the Investment Committee.

This group is responsible for deciding how the foundation’s investments are managed—making asset allocation decisions, making direct investments, selecting outside investment managers, reviewing the investment portfolio performance, and providing periodic reports to the board of directors on investment operations and results.

The committee’s investment strategy carefully balances a conservative bias with a forward-thinking mindset, according to committee chairman Anthony Schneider. While committee members are eager to explore new alternatives in the capital markets, they are always aware of the risk dynamics of the foundation’s portfolio.



Anthony Schneider

“We think deeply about our policies and are ever-mindful of our responsibility to perform at a high level,” Schneider says. “We respect the fact that students of today and those to come are impacted by our attention to details.”

Comprised of volunteers with years of experience in finance and investments, the committee spends hours with foundation staff and financial advisors to assure they have a well-grounded strategy and are partnering with the best managers.

“It is a true privilege to be associated with this outstanding and dedicated group that is as well-versed on what we are doing, and, more importantly, why we are doing it,” Schneider reports. “We know our actions make a difference, and we strive to be impactful, year in and year out.”

## OPERATIONS AND FINANCE COMMITTEE

Although the foundation staff manages the day-to-day business, the Operations and Finance Committee assumes fiduciary responsibility and oversees the overall management of the organization.

The committee advises the board of directors on general fiscal policy and management, as well as all operational matters including budgetary and financial issues. In addition, it provides counsel on personnel issues, including determination of the foundation’s salary pool and its salary structure.

“We help keep the foundation on course—where we want to be now and where we want to be in the future,” says committee chairman Peter Campanella. “By closely examining the budget, financial status and projections, and operations, we recommend strategies and policies that promise prudent management of assets and efficiency in operations.”



Peter Campanella

The committee has an even balance of members with financial experience, who have a good understanding of the numbers, and those with experience in operating a business who are more attuned to budgeting, forecasting, and projections. Most have experience with other not-for-profits, which provides an added dimension of expertise.

Providing clear lines of communication is important to this group, says Campanella, adding that jargon and technology can sometimes muddy up the message. “We want everyone to have a clear understanding about the financial status of the foundation,” he says. “We encourage members of our board, staff, and the public to ask questions and challenge us, so we know we are presenting a clear picture of the state of the foundation.”

## PLANNED AND ENDOWMENT GIVING COMMITTEE

Newest of the six board committees, the Planned and Endowment Giving Committee promotes, supports, and enhances the foundation’s Planned and Endowment Giving Program.

A gift is planned when it involves more extensive consideration than an annual cash gift. Many times, these gifts are purposefully integrated into an overall financial, tax, or estate plan, often involving counsel from professional advisors.

Planned gifts can be current, outright donations of stock, real estate, and life insurance, or a lead trust arrangement. They can also be deferred in a bequest from a will, trust, or retirement plan. Some planned gifts pay the donor income, too, such as gift annuities and charitable remainder trusts.

“Planned gifts are attractive, especially in today’s economy, because they can be deferred and offer many benefits. This includes valuable tax savings, increased income, diversification of investments, and the ability to make a larger charitable contribution than may be possible through an outright gift,” says committee chairman John Seffrin.

Anyone who makes a planned gift of any amount is invited to become a member of the foundation’s Beneficence Society, which currently has more than 500 members.

Also under the watchful eye of this committee, endowed gifts are particularly meaningful to the university as they offer a dependable, perpetual source of funding. Each year, only a portion of the invested income earned is spent while the remainder adds to principal growth. Many planned gifts are used to establish permanent endowments.

Responsibilities of this committee include reviewing and recommending program policies and procedures (including gift acceptance and donor recognition policies) and assisting with the cultivation, education, solicitation, and promotion of planned and endowed gifts to prospective donors.

“Through their ongoing work, committee members have the opportunity to become engaged in broad, major fundraising efforts with the university during our current capital campaign and beyond,” says Seffrin.



John Seffrin

# About the Foundation

Since our beginning in 1951, we have had one cause that has never changed—and never will. Our mission to provide maximum sustainable support for Ball State University places the foundation in the active role of partner to an outstanding and ever improving university and its many parts and participants. We are forever focused on enhancing the excellence of Ball State by attracting and managing financial support and being prudent stewards of the university's resources and relationships.

For almost 60 years, we have been an independent benefactor providing much needed funding for scholarships and continuing support for faculty development, research, physical plant needs, special projects, distinguished professorships, and other educationally related programs that might not be readily available from the state appropriations.

Our investment goal is to achieve a rate of return sufficient to provide a perpetual stream of financial support to the university while preserving the real value of foundation assets. The foundation's portfolio is highly diversified, with significant allocations to defensive hedge fund (risk reduction) strategies, inflation-protection investments in real assets, growth investments in private equity, and traditional equity.

Armed with a dedicated board of directors, highly skilled staff, superior strategic plan, and exceptional investment strategy, we are committed to provide ongoing support to the university through the principles of fiscal responsibility, accountability, transparency, commitment to the public, and responsible stewardship.



Museum of Art

## WHAT WE DO

We receive, invest, and administer gifts from our generous donors made for the support of Ball State. We are responsible for gift and pledge processing, management and administration of university-related funds for the support of scholarships, programs, and projects, asset and investment management, and the Planned Giving and Endowment Stewardship program.

Type of gifts received by the foundation include:

- cash
- bequests in a will or trust
- stock
- donor-advised funds
- retirement plan assets
- real estate
- life insurance
- charitable gift annuities
- charitable lead trusts.

We currently manage more than 1,500 active funds on behalf of the university. This past fiscal year, 32,379 gifts were processed, and 13,153 pledges were entered. Since 1951, the foundation has received more than \$345 million in donations and added more than \$87 million in investment earnings to donor contributions. This has created a pool of financial support of more than \$260 million for university scholarships, programs, and facilities. Our current assets total more than \$173 million.



Park Hall

## Fiscal Year 2009 New Endowments

Ball Brothers Foundation Faculty Fellows in  
Honors College

George and Frances Ball Endowed Chair in  
Environmental Sciences

Dr. Marilyn M. Buck School of Physical Education  
Teaching Scholarship

Class of 1959

Corporate Scholars

A.B. Floyd Leadership Scholars

Carolyn E. Galloway Memorial Scholarship

Nellie B. Gantz Scholarship

Richard Alonzo Gantz Scholarship

E. Cleon Ginn Scholarship

Mary L. (Gantz) Ginn Scholarship

Harding Merit Scholarship

Trotty Heck Memorial Scholarship

Dr. Stephen Hepler Scholarship

Dr. June Irving Scholarship for Early Childhood Education

Grace Jackson Fund

Doug Jones Scholarship

Kovert Hawkins Scholarship

David Letterman Fund for the College of Communication,  
Information, and Media

Randy Pond Emerging Media Scholars

Ram Lal Seekri Endowed Scholarship

Ray and Phyllis Sells Scholarship

Taylor Family Scholarship

Lindsay "Spike" Van Dyke Scholarship in Lighting Design  
and Technology

Marilyn Weaver Faculty Fellowship

Donald R. and Sue H. Whitaker Scholar-Athlete Endowment

Emens Wolper Scholarship A

Emens Wolper Scholarship B

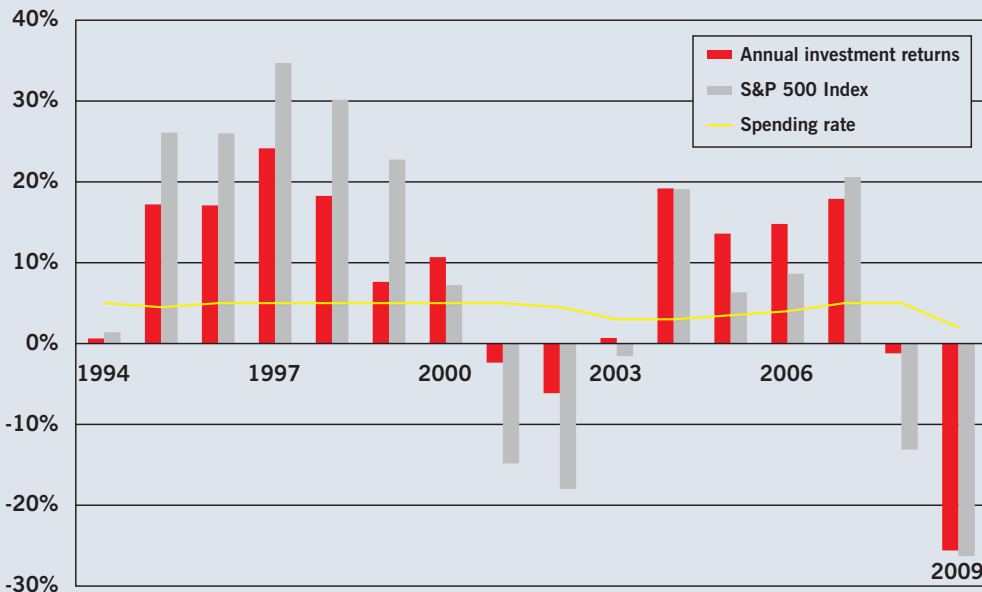
Pauletta and John Woods International Theatre  
and Dance Scholarship

# Financial Comments for Fiscal Year 2009 Annual Report

The Ball State University Foundation faced many challenges during 2009. Financial market turmoil had a significant impact on our investment returns. The financial recession that followed has given our donor base many challenges. Our investment return for Fiscal Year 2009 was -25.6 percent compared to the S&P index return of -26.4 percent.

These factors pushed our unrestricted net assets into a negative position during the year and remain there at year end. Because of this, the foundation was forced to reduce spending rates and take other cost containment measures in order to prudently manage its resources. Despite these unfavorable conditions, the foundation was still able to continue providing significant support to Ball State.

## INVESTMENT RETURNS AND SPENDING RATES FY 1994–2009



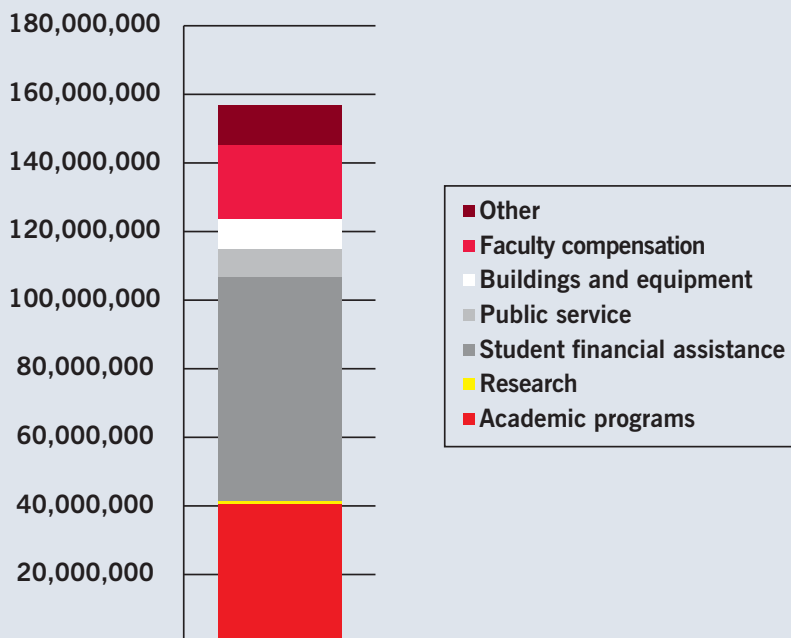
The foundation implemented major new accounting and legal pronouncements during the year:

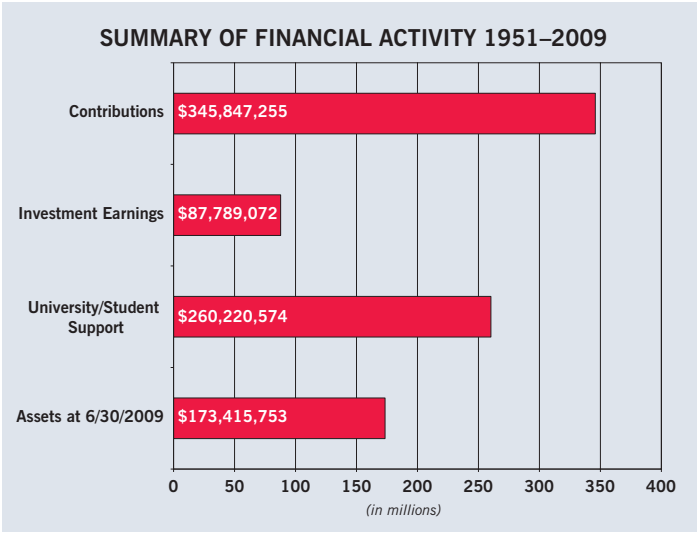
- Uniform Prudent Management of Institutional Funds Act (UPMIFA)

This act was adopted by the State of Indiana. UPMIFA updates the prudence standard that applies to the management and investment of charitable funds. The act also modernizes the rules governing expenditures from endowment funds and adopts provisions governing the release and modification of restrictions on charitable funds to permit more efficient management of these funds.

Looking at a five-year time frame, the foundation earned an average return of 3.5 percent compared to the S&P index return of -0.5 percent. We believe that the construction of our portfolio, specifically the hedge fund portion, helped the foundation's returns during these volatile times. We also believe that our portfolio is positioned to take advantage of the financial markets as they recover during the upcoming years.

## DESIGNATION OF NET ASSETS





- Statement on Financial Accounting Standard (SFAS) 157—Fair Value Measurements

This statement defines fair value, establishes a framework for measuring fair value in generally accepted accounting principles (GAAP), and expands disclosures about fair value measurements. Implementation of this pronouncement had a significant impact on the valuation process and disclosures of our investments.



*Beneficence*

**Planned Giving Totals**

Number of planned gifts during the year . . . . .	44
Dollar value of planned gifts (new and revalued) during the year . . . . .	\$26,622,883
Number of estate gifts during the year . . . . .	31
Dollar value of estate gifts during the year . . . . .	\$1,385,586





*Dehority Complex*

## Statement of Financial Position

### Assets

	2009	2008
Cash and investments in marketable securities	\$140,131,646	\$196,257,748
Contributions receivable	21,567,114	21,563,680
Beneficial interests in perpetual and external trusts	3,465,236	3,727,626
Investments in split-interest agreements	1,928,987	2,601,648
Property and equipment	5,117,767	4,632,950
Other assets	1,205,003	1,069,205
<b>Total assets</b>	<b>\$173,415,753</b>	<b>\$229,852,857</b>

### Liabilities

Accounts payable	\$9,871,603	\$5,296,320
University grants payable	1,341,508	1,341,508
Accrued expenses	163,834	143,169
Line of credit	5,100,000	5,000,000
Bond payable	10,000,000	10,000,000
Annuity and trust obligations	2,518,908	2,782,093
<b>Total liabilities</b>	<b>\$28,995,853</b>	<b>\$24,563,090</b>

### Net assets

Unrestricted	(\$12,455,124)	\$29,559,889
Temporarily restricted	89,672,170	110,224,493
Permanently restricted	67,202,854	65,505,385
<b>Total net assets</b>	<b>\$144,419,900</b>	<b>\$205,289,767</b>
<b>Total liabilities and net assets</b>	<b>\$173,415,753</b>	<b>\$229,852,857</b>

# Statement of Financial Activities

Total Foundation	2009	2008
<b>Revenue, gains, and other support</b>		
Contributions and promotional activities	\$13,994,750	\$23,283,235
Investment income, including net realized and unrealized gains	(46,870,725)	(3,228,537)
<b>Total revenue, gains, and other support</b>	<b>(\$32,875,975)</b>	<b>\$20,054,698</b>
<b>Expenses</b>		
University programs, including capital projects	\$23,008,713	\$24,476,772
Management and general	1,283,140	1,354,313
Fundraising	3,702,039	3,554,566
<b>Total expenses</b>	<b>\$27,993,892</b>	<b>\$29,385,651</b>
<b>Change in net assets</b>	<b>(\$60,869,867)</b>	<b>(\$9,330,953)</b>

## Unrestricted

<b>Revenue, gains, and other support</b>		
Contributions and promotional activities	\$1,363,984	\$1,267,210
Investment income, including net realized and unrealized gains	(31,556,272)	(5,440,392)
Operating support fees	949,728	1,013,183
Net assets released from restrictions and reclassification	15,321,439	13,879,778
<b>Total revenue, gains, and other support</b>	<b>(\$13,921,121)</b>	<b>\$10,719,779</b>
<b>Expenses</b>		
University programs, including capital projects	\$23,008,713	\$24,476,772
Management and general	1,283,140	1,354,313
Fundraising	3,702,039	3,554,566
<b>Total expenses</b>	<b>\$27,993,892</b>	<b>\$29,385,651</b>
<b>Change in net assets</b>	<b>(\$41,915,013)</b>	<b>(\$18,665,872)</b>

## Temporarily Restricted

<b>Revenue, gains, and other support</b>		
Contributions	\$10,622,848	\$20,307,962
Investment income, including net realized and unrealized gains	(14,721,413)	4,879,064
Operating support fees	(931,253)	(959,727)
<b>Total revenue, gains, and other support</b>	<b>(\$5,029,818)</b>	<b>\$24,227,299</b>
Net assets released from restrictions and reclassification	(15,622,505)	(14,210,064)
<b>Change in net assets</b>	<b>(\$20,652,323)</b>	<b>\$10,017,235</b>

## Permanently Restricted

Contributions	\$2,007,918	\$1,708,063
Investment income, including net realized and unrealized gains	(593,040)	(2,667,209)
Operating support fees	(18,475)	(53,456)
<b>Total revenue, gains, and other support</b>	<b>\$1,396,403</b>	<b>(\$1,012,602)</b>
Net assets released from restrictions	301,066	330,286
<b>Change in net assets</b>	<b>\$1,697,469</b>	<b>(\$682,316)</b>

# Foundation Board Members

## OFFICERS

### Chairman

#### J. Richard Emens

Partner  
Emens & Wolper Law Firm LPA  
Columbus, Ohio

### Vice Chairman

#### Stefan S. Anderson (HDD '93)

President (Retired)  
First Merchants Bank  
Muncie, Indiana

### Secretary

#### Peter F. Campanella (BS '67)

President and CEO (Retired)  
World Kitchen  
Boston, Massachusetts

### Immediate Past Chairman

#### Anthony L. Schneider (BS '80)

Managing Director  
Schneider Huse and Associates LLC  
Indianapolis, Indiana

### President\*\*\*

#### David W. Bahlmann

President/CEO  
Ball State University Foundation  
Muncie, Indiana

### Treasurer\*\*\*

#### Jeffrey R. Lang

Vice President of Operations and Treasurer  
Ball State University Foundation  
Muncie, Indiana

### Assistant Secretary\*\*\*

#### Carolyn S. Terry

Executive Secretary  
Ball State University Foundation  
Muncie, Indiana

## DIRECTORS

### Frank A. Bracken

Attorney (Retired)  
Bingham McHale LLP  
Indianapolis, Indiana

### Kelli S. Burrill (BS '75)

CPA (Retired)  
Ernst & Young  
San Francisco, California

### Laura Hansen Dean (BA '72)

Executive Director of Gift Planning  
University of Texas at Austin  
Hutto, Texas

### Thomas L. DeWeese (BS '68, MBA '69)

Attorney/Partner  
Cross Marshall Schuck DeWeese  
Muncie, Indiana

### Mark A. Ervin (BS '81, MA '85)

Managing Partner  
Beasley & Gilkison LLP  
Muncie, Indiana

### R. Wayne Estopinal (BAR '79)

Architect/Owner/President  
The Estopinal Group LLC  
Jeffersonville, Indiana

### Aaron B. Floyd (BS '60)

President/CEO  
Aaron B. Floyd Enterprise LLC  
Jacksonville, Florida

### Brian A. Gallagher (BS '81, HHD '03)

President/CEO  
United Way of America  
Alexandria, Virginia

### John C. Gaylor (BS '76)

President/Chairman/CEO  
Gaylor Inc.  
Carmel, Indiana

### Jo Ann M. Gora

President  
Ball State University  
Muncie, Indiana

### Ben E. Hancock Jr.

Vice President for University Advancement  
Ball State University  
Muncie, Indiana

### Randall B. Howard

Vice President of Business Affairs  
Ball State University  
Muncie, Indiana

### Hollis E. Hughes Jr. (BS '65, MA '73)

President (Retired)  
United Way of St. Joseph County Inc.  
South Bend, Indiana

### Paul L. Kozel

President  
Chesterfield Management Inc.  
Noblesville, Indiana

### James C. Lintzenich (BS '75)

Investor/Consultant  
Naples, Florida

### Matthew J. Momper (BS '83)

President  
Momper Insulation  
Fort Wayne, Indiana

### Kent C. "Oz" Nelson (BS '59, LLD '94)

President/CEO (Retired)  
United Parcel Service  
Atlanta, Georgia

### Donna M. Oklak (BS '77)

Executive Director  
The Sycamore Foundation  
Indianapolis, Indiana

### Randall E. Pond (BS '77)

Senior Vice President of Operations  
Cisco Systems  
Danville, California

### Penny A. Ralston (BS '71)

Professor/Dean Emeritus, Director  
Center on Better Health and Life  
for Underserved Populations  
Florida State University  
Tallahassee, Florida

### Betsy M. Ross (BS '72)

President  
Game Day Communications  
Cincinnati, Ohio

### Patricia Schaefer

Library Director (Retired)  
Muncie Public Library  
Muncie, Indiana

### John R. Seffrin (BS '66, HSD '94)

CEO  
American Cancer Society  
Atlanta, Georgia

### Michael P. Smith (BS '73)

Executive Director  
Media Management Center  
Northwestern University  
Evanston, Illinois

### A. Umit Taftali (BS '85)

President  
Taftali and Co.  
Istanbul, Turkey

### C. Kenneth White (BS '71)

Principal  
Cornerstone Restructuring LLC  
Hoboken, New Jersey

### John E. Worthen

President Emeritus  
Ball State University  
Muncie, Indiana

## DIRECTORS EMERITI

Jan P. Abbs

J.B. Black Jr.

Blaine A. Brownell

J. Robert Browning

Richard W. Burkhardt

William A. Carter

Michael L. Cox

Ben E. Delk

Marjorie L. Hiner

Richard W. Hutson\*\*

Thomas J. Kinghorn

Robert E. Linson

Charles A. Lord

J. Richard Marshall\*\*

Donald L. Mays

Don L. Park

Will Parker

John J. Pruis

Gregory A. Schenkel

James R. Schrecongost

Phyllis C. Shafer\*\*

Mary R. Sissel\*\*

William L. Skinner\*\*

James L. Walker

\*\*Chair Emeritus/Emerita

\*\*\*Nonvoting Members



# BALL STATE UNIVERSITY FOUNDATION

## Staff Members

### Ball State University Foundation

P.O. Box 672  
Muncie, IN 47308-0672  
765-285-8312  
Toll-free: 888-235-0058

### ADMINISTRATIVE STAFF

**David Bahlmann** President and CEO  
**Carolyn Terry** Executive Secretary

### PLANNED GIVING AND ENDOWMENT STEWARDSHIP STAFF

**Philip Purcell** Vice President for Planned Giving and  
Endowment Stewardship  
**DeAnna May** Associate Vice President for  
Communications  
**Amy Thomas** Associate Vice President for  
Fund Stewardship  
**Brenda Repass** Coordinator for Planned Gift Stewardship  
**Lori Kinnett** Planned Giving Assistant  
**Peggy Hensley** Communications Assistant

### FINANCIAL STAFF

**Thomas Heck** Chief Investment Officer  
**Jeffrey Lang** Vice President for Operations  
and Treasurer  
**Sunny Reed** Senior Financial Clerk  
**Penny Cahoe** Financial Clerk  
**Lindsay Russell** Financial Assistant  
**Antoinette Hatzell** Financial Assistant  
**Tracy Curtis** Controller  
**Donna Slater** Assistant Controller  
**Kathy Poe** Receptionist/Administrative Assistant  
for Operations

### University Advancement

Administration Building  
Ball State University  
Muncie, IN 47306-0082  
765-285-1633  
Toll-free: 877-448-2278

**Ben Hancock Jr.** Vice President for  
University Advancement  
**Carol Kosisko** Assistant to Vice President for  
University Advancement and Director  
of Special Projects  
**Ruth Ann Miller** Secretary to the Vice President  
for University Advancement

### Office of University Development

Alumni Center  
Ball State University  
Muncie, IN 47306-0082  
765-285-8261  
Toll-free: 866-953-2653

**Charles "Chip" Jagers** Executive Director  
**Kelly Shrock** Associate Executive Director  
of Development  
**Mary Ann Olinger** Senior Director of Development  
**Stephanie Arnold** Director of Development  
**Brenda Bergl** Director of Development  
**Sarah Jenkins** Director of Development  
**Marcia Kelly** Director of Development  
**Monica Peterson** Director of Development  
**Mark Robbins** Director of Development  
**Beth Snyder** Director of Development  
**Brent Baldwin** Director of Corporate Relations  
**Sue Beach** Director of Donor Relations  
**Jennifer Marsh** Director of Annual Giving  
**Jerry Peirson** Director of Athletic Development