

**Rock Valley College Board of Trustees
Community College District No. 511
3301 N. Mulford Road, Rockford, IL 61114**

**Special Meeting – Retreat
Woodward Technology Center (WTC), Room 1308
8:00 a.m., Saturday, January 31, 2026**

Agenda

- A. Call to Order**
- B. Roll Call**
- C. Board Member Attendance by Means Other Than Physical Presence**
- D. Communications and Petitions (Public Comment)**
- E. Recognition of Visitors**
- F. Discussion:**
 - 1. Team-building Exercise #1
 - 2. Strategic Plan [Update](#)
 - 3. Enrollment: Getting Started Steps and SWOT [Analysis](#)
 - 4. Bank and Investment Strategy [Analysis](#)
 - 5. Team-building Exercise #2
 - 6. Legislative [Update](#)
 - 7. Key Takeaways
- G. Adjourn to Closed Session** to discuss the following: 1) The appointment, employment, compensation, discipline, performance, or dismissal of specific employees, specific individuals who serve as independent contractors in a park, recreational, or educational setting per Section 2 (c) (1); and/or 2) Litigation has been filed, is pending, or probable per Section 2 (c) (11), all in accordance with the Illinois Open Meetings Act
- H. Reconvene Open Session**
- I. Action Item**
 - 1. Purchase Report - FY2026 Amendment ([BR8354](#))
- J. Date of Next Committee of the Whole Meeting:** February 10, 2026, 5:15 p.m. Meeting to be held in the Performing Arts Center (Room 0214) in the Educational Resource Center (ERC) on the main campus.
- K. Date of Next Regular Board of Trustees Meeting:** February 24, 2026, at 5:15 p.m.; The meeting will be held in the Performing Arts Room (PAR, Room 0214) in the Educational Resource Center (ERC) on the main campus.
- L. Adjourn**

Paul Gorski, Board Chair



STRATEGIC PLAN UPDATE

Board Retreat
January 31, 2026

Dr. Julie Kunselman, Studer Education

Heather Snider, Vice President Institutional Effectiveness & Communications

ABOUT RVC

Rock Valley College is a comprehensive two-year community college in Rockford, Illinois, offering more than 100 courses for transfer, career programs, and certificates.

MISSION STATEMENT

Rock Valley College empowers students and community through lifelong learning.

VISION STATEMENT

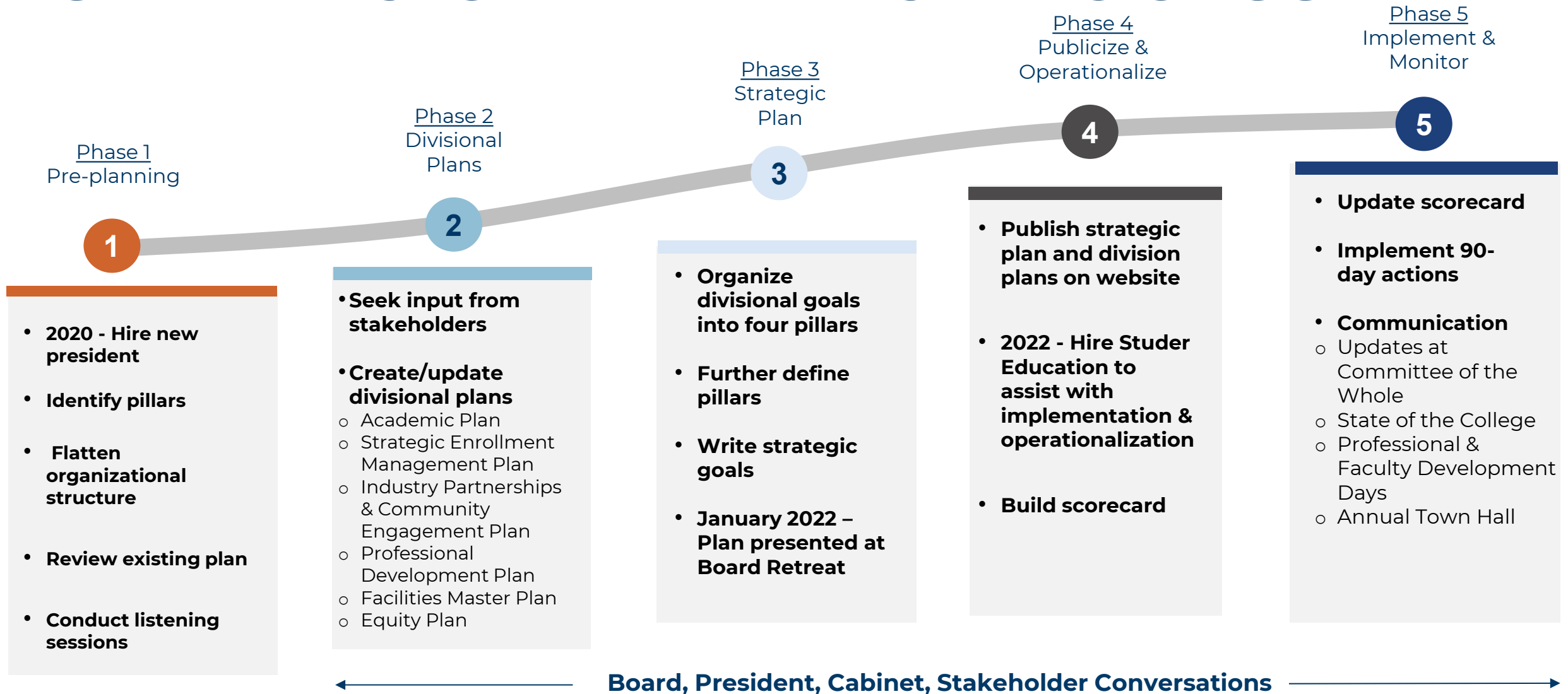
Rock Valley College empowers the community to grow as a society of learners through well-designed educational pathways, leading to further education, rewarding careers, cultural enrichment, and economic-technological development.

THE FOUR PILLARS

Rock Valley College is guided by its 2022-2027 Strategic Plan which contains four strategic plan pillars.



STRATEGIC PLANNING PROCESS



NEXT STEPS: STRATEGIC PLAN REFRESH

Why

- The current plan is "expiring"
- Present refresh draft to Trustees by end of calendar year
- Opportunities to address questions, concerns, ideas
- Accreditation recommendations

What

- Pillars remain the same
- Review Mission, Vision, Core Values
- Update goals, targets, and scorecard
- Incorporate Strategic Enrollment Management Plan and Academic Plan with focus on adult learners

How

- Establish Institutional Effectiveness Committee – Front End
- Continue Studer work with Cabinet and Leadership Development Institute – Back End

IMPLEMENTATION: FRONT-END EXECUTION

Alignment to pillars

- Power Point Template
- Expectation Plan and Review Document
- Professional Development Day Session Form
- Budget Requests
- Communications and Marketing Request Form
- Institutional Research Data Request Form

ACCESSIBILITY OVERVIEW

Accessible presentations ensure all audiences – including those with disabilities – can fully engage with your content. This is a legal requirement and compliance as of April 2026 is mandatory

DIGITAL ACCESSIBILITY BASICS

- Run the Accessibility Checker found under Review > Check Accessibility
- Use bullet points in slide layouts for correct reading order
- Keep font size consistent
- Always use bold text for emphasis
- Ensure contrast between text and background
- Add alt text to images
- Provide a logical reading order
- Use consistent formatting
- If in doubt, ask for help

THE FOUR PILLARS

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RVC

IMPLEMENTATION: BACK-END SUPPORT

- Making connection between the work I do every day and the strategic plan
- Should I be doing this work....
- Prioritizing work for service-requests when there are multiple competing submissions
- Culture Survey ties in - (1) "meaningfulness of work" (is what I do meaningful... meaningful not only to me, but also to the plan. (2) By improving culture, we're also improving teamwork and reducing silos which also improves the work

COMMUNICATION: FRONT-END EXECUTION

- Quarterly and monthly Board updates
- Revisions to leadership page on intranet
- Campus updates
 - Monthly Leadership Update
 - Professional Development Day
 - Faculty Development Day
 - Annual Town Hall
- Career Technical Education & Workforce Development Newsletter
- Collaboration between CTE & Workforce Development (WD) and Academic Affairs (AA)

COMMUNICATION: BACK-END SUPPORT

- Quarterly onsite meetings with Cabinet; monthly meetings with Dr. Spearman and other leaders
- Culture Survey identified communication as an area in need of improvement – with results rollout to have conversations and build relationships with teams and their leaders (and asking for help!)
- Collaboration between divisions (e.g., WD and AA)
- LDI work bringing next-level leaders together for conversations about ---- and opportunities to collaborate and have conversations with each other
- Professional Development Book Club on Fridays to collaborate and communicate and learn examples from others outside of RVC
- Scorecard and 90-day goals as a communication tool (for priority focus and "how does it relate to my work?")
- Framing development day conversations when it makes sense (e.g., faculty development day)

RECOGNITION & COMMUNITY LEADERSHIP: FRONT-END EXECUTION

- 2024 Higher Education Excellence in Diversity (HEED) Award
- 2024 Illinois Community College Trustee Association (ICCTA) Business/Industry Partner Award with Bourn & Koch
- 2025 ACCT Leadership Congress presentation – *From Plans to Success: The Use of Scorecards and Quarterly Action Steps*
- American Association of Community Colleges (AACC)
 - Finalist - 2025 Advancing Institutional Equity and Belonging Award
 - Winner - 2025 Outstanding College/Corporate Partnership with AAR
- K-20 Collaborative
- Aspen Top 200
- Aspen Rising Presidential Fellowship (Dr. Smith, FY2026)
- Lakin Institute (Dr. Spearman as facilitator, 2025 and Dr. Stewart as participant, 2024)
- Certificate of Achievement for Excellence in Financial Reporting
- Employee of the Year, Leader of the Year, Rookie of the Year, Faculty of the Year
- Foundation – new scholarships, scholarships awarded, donations

RECOGNITION & COMMUNITY LEADERSHIP: BACK-END SUPPORT

- "You're really good at X" - external validation of work, efforts – what you're doing is good work and others should know about it
- Destination High Performance provides opportunity to share great work and learn from other executive teams
- Connection with other executives (network) (e.g., Caring Campus)
- K-20 Collaborative

QUESTIONS?

RVC is an equal opportunity educator and employer.
For more information, visit RockValleyCollege.edu.



BOARD OF TRUSTEES RETREAT

ENROLLMENT DISCUSSION: GETTING STARTED STEPS AND SWOT ANALYSIS

Dr. Patrick Peyer, Vice President of Student Affairs

January 31, 2026

AGENDA

- Getting Started Steps
 - Q & A
- Enrollment SWOT Analysis
 - Strengths and Weaknesses
 - Q & A
 - Opportunities and Threats
 - Q & A
- Summary
 - Q & A

Getting Started Process

- Apply
 - CRM Engagement Data
- Technology Access
- Placement
 - Multiple Measures
- Register and Pay
 - Academic Advising

Getting Started Process: Apply

- **CRM DATA**
 - Request For Information (RFI)

Fiscal Year	Completed Requests for Information	Enrolled Requesters
2024	2,331	328
2025	2,703	332
2026	1,225	90

Getting Started Process: Apply

- **CRM DATA**
 - Email engagements

Fiscal Year	Emails Delivered	Emails Opened	Click-Through Rate
2023	88,872	54,258	5.79%
2024	236,786	167,861	6.12%
2025	301,302	219,845	4.37%
2026	205,298	139,192	4.84%

Getting Started Process: Apply

- **CRM DATA**
 - Applications

Fiscal Year	Credit Applications
2023	3,921
2024	10,110
2025	9,885
2026	5,752

Getting Started Process: Apply

- **CRM DATA**
 - Appointments

Fiscal Year	Appointments Booked
2024	10,643
2025	20,960
2026	15,438

Getting Started Process: Apply

- **CRM DATA**
 - Enrollments

Fiscal Year	Credit Applications	Applicants Who Later Enrolled	Applications to Enrolled Students
2023	3,921	N/A	N/A
2024	10, 110	3,740	36.9%
2025	9,885	3,677	37.1%
2026	5,752	1,224	N/A

Getting Started Process: Technology

- Log-in and Password set up
- Multi-Factor Authentication

Getting Started Process: Placement

- Multiple Measures
 - GPA
 - ACT/SAT/Accuplacer
 - GED Scores
 - Transfer Credit
 - Dual Credit

Getting Started Process: Registration and Payment

Case Management Meeting/Outreach Plan

Year 1, Semester 1

- Academic readiness/goals
- Curriculum Code/Degree plan
- Transfer/Career goals
- Financial resources
- Registration support

Year 1, Semester 2

- Academic concerns/goals review
- Curriculum Code/Plan review
- Transfer/career/internship review
- Financial needs review
- Registration support

Year 2, Semester 1

- Academic goals/concerns review
- Curriculum Code/Graduation audit
- Transfer plan/fairs/visit
- Career/internship/fairs goals
- Financial needs review
- Registration support

Year 2, Semester 2

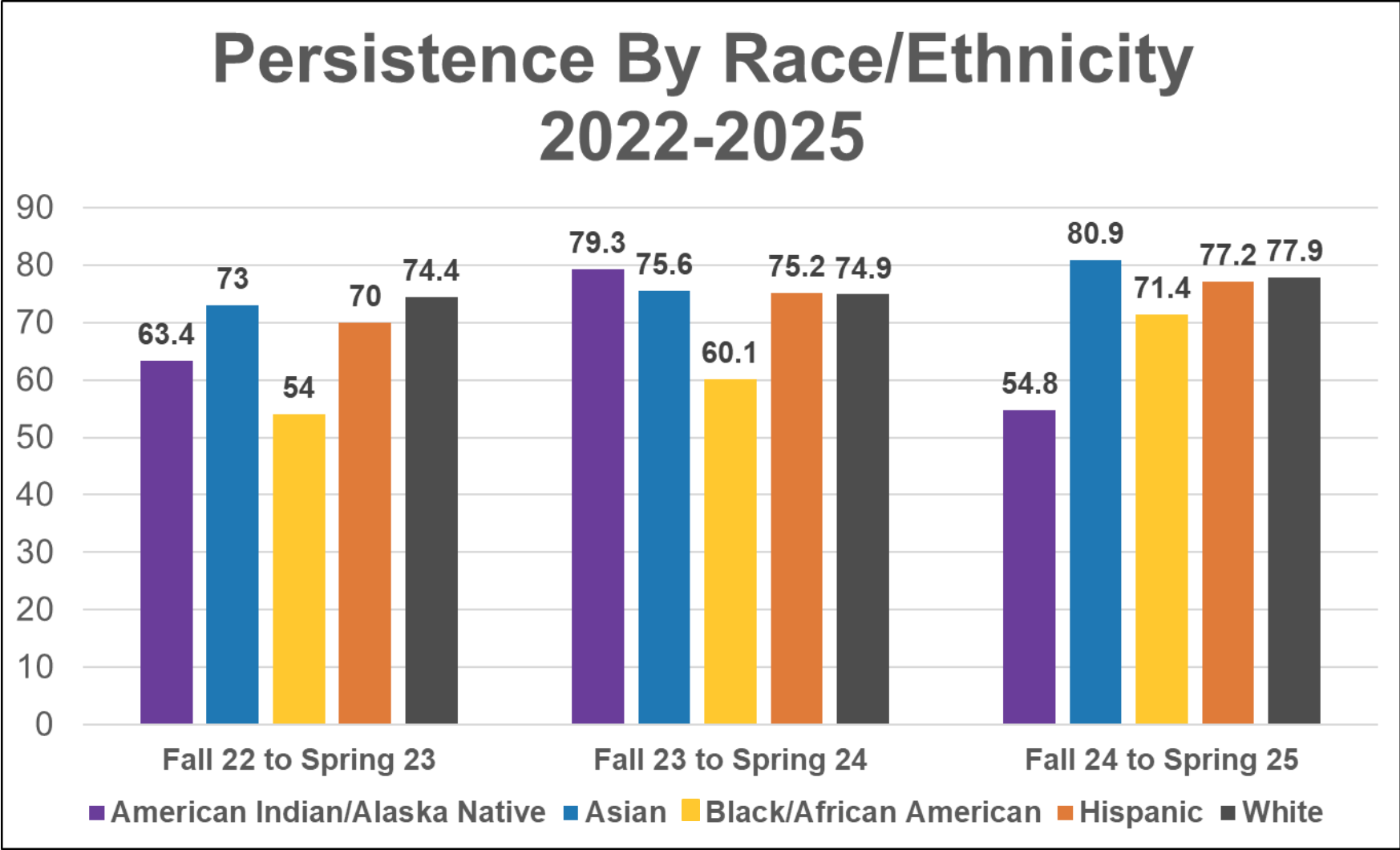
- Academic goals/concerns
- Degree completion review
- Graduation application
- Transfer plan confirmation
- Career/internship/job placement

Getting Started Process: Registration and Payment

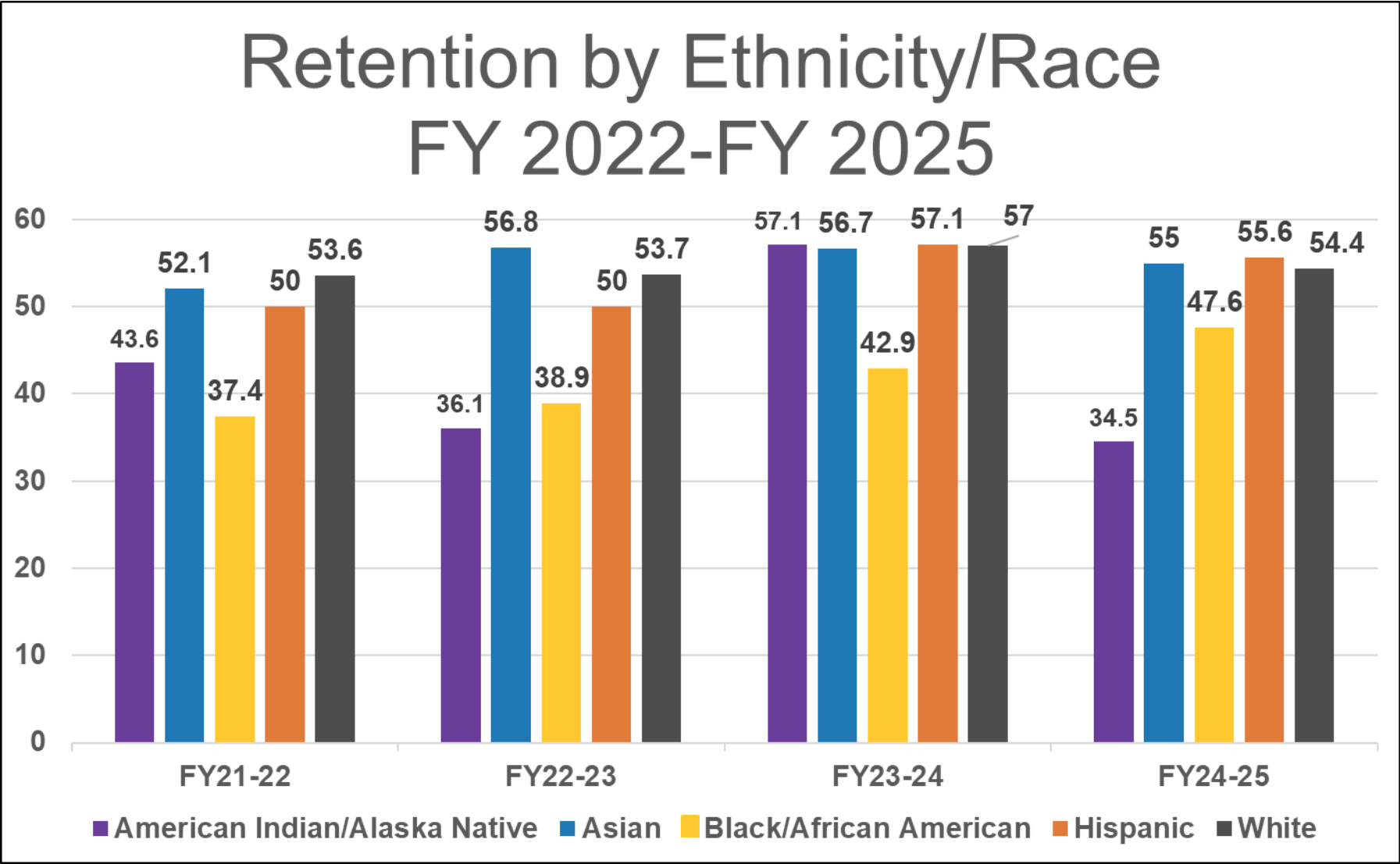
Advisor Type	Phone Calls Made	In person Appts	Phone Appts	Virtual Appts	Walk-in Appts	Email	Total Contacts
AA	6,608	2,876	1,122	139	1,799	3,286	15,830
AS	2,100	1,109	480	204	294	2,903	7,090
CTE	2,917	1,094	243	24	705	8,155	13,138
Career Services	5,833	369	36	29	128	1,997	8,392
FYE	1,086	na	na	na	104	na	1,190
Total Contacts	18,544	5,448	1,881	396	3,030	16,341	45,640

Duplicated head count

Getting Started Process: Registration and Payment



Getting Started Process: Registration and Payment



QUESTIONS?

RVC is an equal opportunity educator and employer.
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SWOT Analysis

Regional Context

- Illinois community colleges are seeing modest growth
- District 511 has historically witnessed lower college-going rates and economic challenges
- Strong enrollment, retention, transfer and financial aid support systems are in place

Strengths

- Salesforce CRM (application and communication)
- RVC Foundation scholarships
- Growth in Dual Credit and High School partnerships/enrollment
- Low Credit Hour cost
- Growth in non-credit/workforce offerings Business and Industry partnerships
- Specialized student supports for underrepresented populations
- Transfer partnerships

Weaknesses

- Regional college “going” rates
- Regional population decline (10 year -1.6%)
- Financial Aid utilization rate is low (~50%)
- Course Fees and other “hidden” costs of education
- Limited Open Educational Resources (OER) utilization
- Declining number of traditional aged students available to enroll
- Limited awareness of community college pathways

QUESTIONS?

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Opportunities

- Salesforce CRM growth and improved use; texting, dashboards, high risk alert status, Canvas integration
- Adult Learner regional population
(+1% 20-24: -2% 25-29: -3% 30-34: +9 35-39: +2% 40-44)
- Re-skilling need/demand
- Downtown Campus
- Evening classes, late start in-person courses
- Growth in CTE and Trade/Workforce programs
- Credit for Prior Learning improvements and growth
- Adult Education partnership and pathways
- Community College Bachelor's Degree: legislation pending
- Artificial Intelligence

Threats

- Ghost student applications and fraud attempts
- Population decline in traditional aged students (Illinois move-out issue)
- Competition from online and out-of-region institutions
- Well-paying entry level positions that do not require post-secondary education or training
- Federal guidance and policy unpredictable, Department of Education, Financial Aid Loan Default Rate, value of higher education.

SWOT Enrollment Summary

- Likely: Flat to modest growth (0% to +4%) over next 3-5 years
- Continue to:
 - Monitor and implement action items contained in Strategic Enrollment Management Plan
 - Expand workforce & short-credential pathways
 - Invest in wraparound supports
 - Focus on adult learners
 - Increase dual-credit and high school engagement
 - Strengthen FAFSA

QUESTIONS?

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Bank and Investment Strategy Analysis

Presented to: Board of Trustees Board Retreat

January 31, 2026

Ellen Olson, Vice President of Finance & CFO

Executive Summary

This analysis outlines a prudent and strategic approach to banking and investment for Rock Valley College. The strategy prioritizes safety, liquidity, and yield, in that order, aligning with Illinois statutes and best practices in public fund management. The goal is to ensure that public funds are protected, accessible when needed, and earning reasonable returns to support the college's educational mission.

Objectives

- Preserve capital by adhering to state laws and internal investment policies.
- Ensure liquidity to meet operational needs, payroll, and capital projects.
- Optimize earnings within acceptable risk parameters.
- Diversify banking relationships to mitigate risk and leverage financial services.
- Maintain compliance with Illinois Public Funds Investment Act (30 ILCS 235).

Current Financial Overview

- Operating Budget: \$69,326,152
- Unrestricted Cash Reserves: \$41,304,561 as of June 30, 2025
- Monthly Payroll & Expenses: average \$3,700,000
- Primary Bank Partner: Illinois Bank & Trust/UMB
- Number of Active Banking Accounts: 5
- Financial Services Partner: Public Treasury Management and Advisory Financial Solutions (PTMA)

Banking Strategy

Bank Selection & Review

Maintain relationships with one FDIC-insured banking institution for daily operations. Conduct annual review of banking services, fees, and interest earnings. Maintain relationship with one financial services firm that can provide a platform of solutions that includes participation in Illinois School District Liquid Asset Fund (ISDLAF) or Collateral Pooling Program.

Liquidity Management

Maintain 3–6 months of operating cash in highly liquid accounts (e.g., interest-bearing checking or money market accounts).

Account Structure

Separate accounts by function (operating, payroll, accounts payable, financial aid disbursements, capital projects). Use zero-balance accounts (ZBAs) to consolidate cash management and reduce idle balances.

Investment Strategy

Policy Alignment

All investments must comply with Board Policy 5:10.080 which includes the Illinois Public Funds Investment Act (30 ILCS 235).

Investment Instruments

- U.S. Treasury securities and instruments guaranteed by the U.S. government
- Certificates of Deposit (CDs) from Illinois-approved depositories
- Illinois Funds (state-run pooled investment program)
- Illinois School District Liquid Asset Fund (ISDLAF)
- Municipal bonds (Illinois-rated, with A or higher credit rating)
- Short-term commercial paper (A1/P1 rated)

Investment Strategy (continued)

Maturity Management

Ladder investments to balance liquidity and return. Limit long-term maturities (>3 years) to no more than 25% of total investments. Maintain at least 40% of portfolio in maturities less than 12 months.

Diversification and Risk Control

Limit exposure to any one institution or instrument to minimize risk. Periodic review of credit ratings and performance benchmarks.

Fixed Income Portfolio Snap Shot

Operating Investments Maturities-Cost Basis (as of December 31, 2025)

Negotiable certificates of deposit
U.S. Treasury Obligation
ISDALF Term Series
TOTAL

Weighted Average Less than 6 Months Interest Rate		Weighted Average 6 Months to 12 Months Interest Rate		Weighted Average 1 Year to 3 Years Interest Rate		Weighted Average TOTAL Interest Rate	
24,234,825	4.01	32,696,745	3.68	1,696,133	3.70	58,627,706	3.82
6,240,395	4.07	1,992,944	3.93			8,233,339	4.04
7,250,000	3.84	1,250,000	3.58			8,500,000	3.81
37,725,220	3.99	35,939,689	3.69	1,696,133	3.70	75,361,045	3.84

Reporting and Oversight

Provide monthly cash and investment reports to the Board by major categories.

Engage independent auditors for annual review of banking and investment activity.

Maintain transparency with public disclosures as required by law.

Recommendations

- Review the Investment Policy annually and ensure alignment with state laws.
- Maintain banking RFP process every 3–5 years to ensure competitive service.
- Continue and increase use of cash management technology (e.g., ACH payments, positive pay).
- Consider professional investment advisory services for portfolio management if assets exceed internal expertise.

Conclusion

A disciplined and transparent banking and investment strategy ensures the financial resilience of Rock Valley College. By focusing on safety, liquidity, and responsible returns, the college can confidently support its educational mission and long-term capital planning.

Rock Valley College Board Retreat

Rock Valley College
January 31, 2026

Topics for Discussion

Federal Issues

State Issues

Community College Advocacy

Questions

ACCT-AACC Legislative Priorities

Appropriate necessary dollars for the Pell Grant to

- Accommodate program growth due to the simplified FAFSA, workforce Pell, and increasing enrollments;
- Keep pace, at minimum with inflation (increase maximum grant by \$200), to promote affordability and limit borrowing for low-income students;
- Maintain student Pell eligibility, as expanded by the Simplified FAFSA Act and H.R. 1; and
- Sustain the long-term fiscal health of the program.

Pell Grants remain the foundation of student access and success in higher education

End the Taxation of Pell Grants

Make Pell Grants tax-free for all low-income students. Because of their low tuition, community college students must pay taxes on Pell Grant funds used for living expenses. By law, Pell Grants must be used for specified educational expenses; taxing them exacerbates affordability challenges for the lowest-income students.

Modify the American Opportunity Tax Credit

The \$2,500 American Opportunity Tax Credit (AOTC) should be altered so that Pell Grant awards are not counted against a student's eligibility. With this change, hundreds of thousands of low-income community college students would receive the credit annually. Community college students are generally the only college students whose Pell Grants render them ineligible for AOTC, as the program's design does not reflect the low tuitions they pay.

ACCT-AACC Legislative Priorities

Strengthen Under-Resourced Institutions

Protect and strengthen total and individual funding for Higher Education Act institutional aid programs in Title III and Title V. Ensure the individual program funds are allocated consistent with FY26 (Jan. 20) levels as determined by Congress. In FY27 appropriations, protect and strengthen FY26 levels, and provide at least FY24 levels for the Strengthening Institutions Program (SIP).

Institutional aid allows under-resourced institutions to close achievement gaps. Eligible institutions must generally enroll student bodies where at least half of all students are Pell-eligible and there are relatively low per-student expenditures. As a result, these critical institutional aid programs support the basic goals of the Pell Grant program—creating equal opportunity for all postsecondary students.

Ensure America's Economic Prosperity

Maintain America's economic prominence by ensuring that there is an adequate supply of trained workers. As such, retain the bipartisan Congressional priority to pass comprehensive immigration reform, addressing undocumented individuals who entered the U.S. as minors and providing opportunities for workers with temporary status.

Buoy Rural Community Colleges

Provide federal funding streams to community colleges to support rural economic development, particularly in the agricultural sector. As outlined in the Community College Agriculture Advancement Act, provide grants to community colleges for agricultural and natural resources programs that support the growing need for a highly skilled agricultural workforce.

ACCT-AACC Legislative Priorities

Strengthen the Workforce Innovation and Opportunity Act (WIOA)

WIOA legislation should increase emphasis on the role of community colleges in the national workforce and include authorization of the Strengthening Community College Training Grant (SCCTG) program, which has supported community colleges in 35 states since its inception.

Bolster Job Training and Career and Technical Education

Support community college training programs that lead to in-demand jobs by expanding the Department of Labor's Strengthening Community College Training Grants (SCCTG) program, now in its 7th year. The program is remarkably successful in catalyzing economic activity and regularly receives far more quality applications than can be funded.

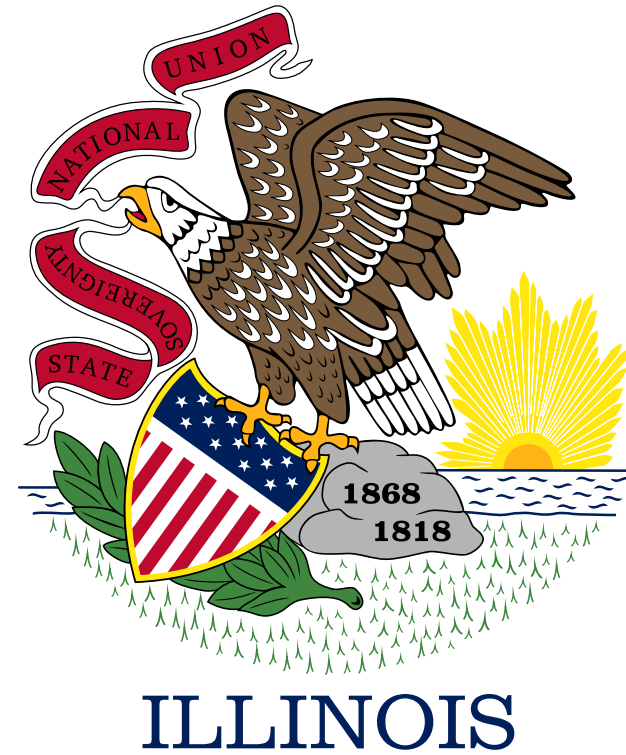
Support Adult Basic Education (ABE)

Continue support for ABE so that adults can gain skills for jobs or be able to participate in further education and training. Proposed cuts to this program will create even more challenges for businesses seeking qualified workers, and reduce overall access to higher education.

Fortify Child Care Access Means Parents in Schools (CCAMPIS)

Reinforce this targeted, two-generation program that helps provide high quality childcare designed to meet the circumstances of parenting students.

Illinois Legislative Issues



ICCTA Legislative Priorities

- Pursue Community College Workforce Degrees
 - As Illinois faces significant workforce shortages, particularly in technical high-wage/high-demand fields, community colleges are ready to meet these demands through baccalaureate degree offerings. Community colleges already engage with thousands of employers and play a critical role in developing talent to fill gaps in industries.
 - Legislation should require an evidence-based approval process through ICCB and IBHE demonstrating workforce demand, employer support, and regional alignment; ensure community college baccalaureate programs meet all state and accreditor (HLC) standards; cap tuition and fees at no more than 150% of current community college rates; and require a cost analysis confirming sufficient institutional resources.



Illinois families are priced out of higher education-students are graduating with heavy debt or not enrolling at all. Community college bachelor's degrees would expand affordable options.

Access + Affordability=Stronger Workforce & Communities

Students are priced out of traditional four-year options

- Tuition keeps rising
- Students with families or jobs can't relocate or absorb extra costs
- Many start at community college, but can't finish here-losing momentum and dollars spent.

Illinois already subsidizes education-let's make it go further

- Community colleges have lower rates and strong local ties
- Allowing them to offer bachelor's degrees means a better ROI on existing state investment.

Access + Affordability=Stronger Workforce & Communities

Workforce Needs are local-
degrees should be too

- Health care shortages in rural areas
- Tech and manufacturing skills gaps
- Teachers leaving due to lack of affordable pathways

Affordability isn't just
tuition-it's total cost

- Transportation
- Childcare
- Housing
- Lost wages

ICCTA Legislative Priorities

- Enhance Student Transfer and Articulation Policies
 - Illinois must improve the transfer process between community colleges and four-year institutions to ensure students can efficiently pursue their degrees without delays or added costs. This includes strengthening articulation agreements and creating clear, guaranteed transfer pathways.
 - ICCTA supports legislation that fosters seamless credit transfer, enhances student advising, and expands transfer opportunities. These improvements will help increase degree completion rates, reduce financial burdens, and strengthen Illinois' workforce.

ICCTA Legislative Priorities

- Prepare Illinois' Future Workers
 - Following last year's action to guide the responsible use of artificial intelligence in higher education, Illinois community colleges are focused on equipping students with workforce skills needed in a rapidly changing economy.
 - ICCTA supports continued investment in career and technical education (CTE), work-based learning, and innovative career pathways to grow Illinois' common workforce ecosystem. By aligning education with workforce demand and advancing opportunities in emerging industries, community colleges will ensure Illinois remains a leader in preparing students for the jobs of today and tomorrow.

Tips and Reminders for NLS and Lobby Day Prep



Gathering Your College Data & Stories



Collect relevant facts and stats about the institution and student body



Enrollment



Student profile



Determine stories to share – student perspective is best



Prepare federal funds worksheet



College one-pager

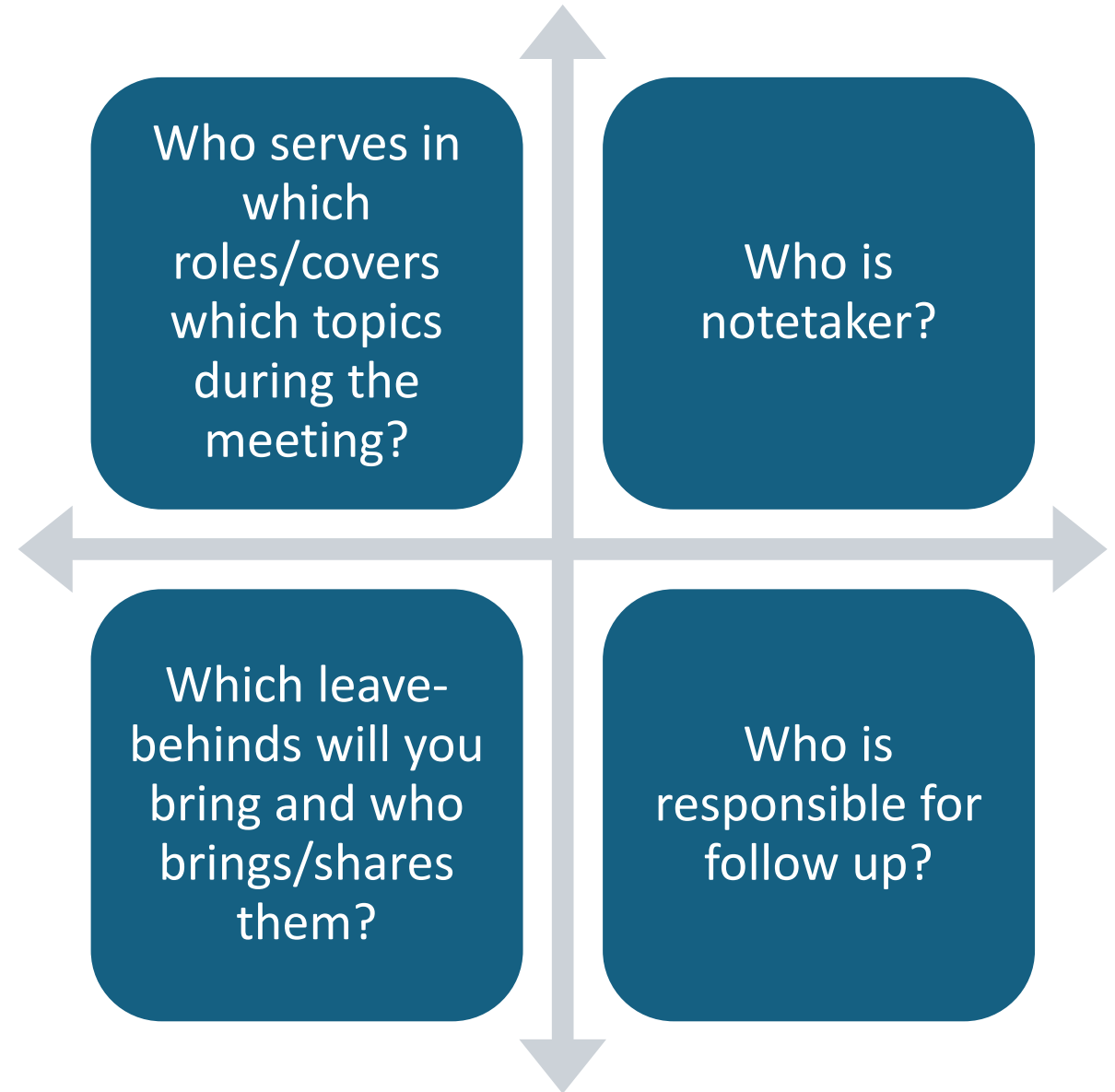
Planning Your Meeting Content

What are your
main asks?

What data will
you share?

What are your
stories/examples?

Planning Your Meeting Logistics



Planning Your Meeting Tips

- Leave enough time between meetings to get from one place to another.
 - The Congressional Campus is large! Particularly going from the House to the Senate and vice versa.
- Arrive early! Member schedules are tight. They may not be able to wait for you.
- If a prior meeting runs late, update the next office as soon as possible.
- Be flexible! Hill offices are small, especially on the House side.
- If you're meeting with staff only, you may meet at their desk or in a hallway.
- Time may be limited, so cover your top priority first.

Questions?

Purchase Report - FY2026 Amendment

Recommendation: Board approval for items marked with an asterisk

A. Architect Firm – (Other Contractual Services – Downtown Campus)

Demonica Kemper Architects (DKA) Chicago, IL \$260,000.00*(1)

1. This increase is to cover additional design services needed for the Downtown Campus. DKA was awarded the contract during the September 26, 2023 Board of Trustees meeting as a result of the Request for Qualifications #23-17 Architect for RVC Downtown Campus. This increase will enable DKA to continue the necessary services to see the project through to completion. This amendment is a not-to-exceed amount and is subject to a written amendment to the College's existing contract with DKA which shall be subject to the Board of Trustees' attorneys' review.

Original approved amount	\$3,000,000.00
Increase requested	\$ 260,000.00
New total expenditure	\$3,260,000.00 Not to Exceed

FY2026 Budgeted Expense
Original Board Report BR 8087-A

Howard J. Spearman, Ph.D.
President

Board Approval: _____
Secretary, Board of Trustees