



# INDIANA MEMORIAL UNION

STRATEGIC PLAN  
2007-2012



# A STRATEGIC PLAN FOR THE INDIANA MEMORIAL UNION

**2007–2012**

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## **EXECUTIVE SUMMARY**

Since 1909, the rich tradition of the Indiana Memorial Union has served as a welcoming organization to bring students, faculty, staff, and alumni together. The Union has been a common ground, a place where the student-staff partnership is valued. At the same time, Union activities and programs have complemented academic programs and have offered students opportunities in leadership training for IU and beyond.

The Indiana Memorial Union is the meeting place for all members of the Indiana University family. The facility itself communicates the values, traditions, and ceremonies that make Indiana University unique and special.

The Indiana Memorial Union will celebrate its 100<sup>th</sup> anniversary in 2009. To assure that the Union continues to serve Indiana University during its second century as well as it has its first, a strategic planning process update process was launched in 2004. The intent of this two-year process was to continue implementation of the 2002 Strategic Plan, while also beginning a process of self-examination for this next phase of organizational life—this strategic plan for the timeframe 2007–2012.

- Position the Indiana Memorial Union as central and relevant to student life
- Improve ease of use of Indiana Memorial Union services, programs and facilities
- Decrease over-reliance upon hospitality revenues
- Increase competitiveness in the hospitality business
- Implement a comprehensive human resources program
- Improve food service offerings to fulfill customer demand
- Improve programmatic offerings to entertain, build community, and activate the building
- Reevaluate space utilization and allocation to assure building offerings match strategic objectives and campus needs

## **PROCESS**

The process of updating the 2002 strategic planning document (called "*The Provider of Choice: A Strategic Plan for the Indiana Memorial Union*") commenced in January 2005 and reached its first major completion phase in August 2006. This first major completion phase consisted of reaffirmation of the long-standing *Mission* with only minor reformatting for length; a new *Vision* statement; and new *Strategic Priorities*. The updated plan was completed and published in January 2007.

Strategic Priorities were the focus of the most intensive and frequent work by Indiana Memorial Union staff and students during this two-year process. This document was aided by an organizational assessment process informed by students, campus colleagues, survey and focus group research, and an external consulting process.

### **August, 2004–December 2004**

- Executive Director conducted modified "qualitative research" by interviewing and meeting with students, faculty, and staff to learn their perspectives on the Union. Thematic summary information shared with Executive Committee in January 2005.

### **January 2005**

- Indiana Memorial Union executive committee retreat held
  - Discussions - executive director summary and 2002 Strategic Plan

### **Spring 2005**

- Administration of *EBI Student Satisfaction Survey*
- Administration of Sodexo *LIFEStyling* student geo-demographic analysis
- Completion of environmental scan

### **June 2005**

- Indiana Memorial Union executive committee retreat held
  - Discussions: *60 Minutes* television program about today's college students, review of Indiana Memorial Union mission, review of *Good To Great* book (by Jim Collins)

### **Fall, 2005–Spring 2006**

- Market research study and food service strategic planning study completed with assistance of external consultants (Brailsford & Dunlavy, Envision Strategies).

### **January 2006**

- Indiana Memorial Union executive committee retreat held
  - Discussions: Review of 2005 EBI Student Satisfaction survey results, review of Indiana Memorial Union Mission and Priorities, development of Strengths/Weaknesses/Opportunities/Threats (SWOT) list

### **Spring, 2006–Summer 2006**

- Small group work with students and staff to synthesize previous discussions to review Vision, Mission and Strategic Priorities.

### **August 2006**

- Indiana Memorial Union adopted new Vision and Strategic Priorities and reaffirmed existing Mission, Values, and Principles.

### **January 2007**

- Indiana Memorial Union executive committee retreat
  - Discussions: completed Strategic Priorities, Goals, and Objectives

## **VISION, MISSION, VALUES & PRINCIPLES**

The long-standing *Mission* was reaffirmed as accurate and only reformatted for length in this updated Strategic Plan. The *Vision* and *Strategic Priorities* were revised to reflect emerging trends and aspirations. *Values* and *Principles* are core to the organization and remain unchanged from the 2002 Strategic Plan.

### **Vision**

The Indiana Memorial Union will be known as a vibrant campus center where members of the University community feel connected, engaged and safe.

### **Mission**

The Indiana Memorial Union:

- Serves as the community center for all members of the university community—students, faculty, staff alumni, and guests.
- Serves as part of the educational program of the University by providing opportunities for student development through volunteer services, employment, and self-directed activity.
- Serves as a conference center for the Bloomington campus of Indiana University.
- Provides the services, conveniences, and amenities that are needed in daily campus life and in support of the mission of the university.
- Serves as a unifying force—a point of identification—in the life of Indiana University

### **Values**

- Integrity — We value the personal commitment to honesty and truth that is reflected in each associate's words and deeds.
- Diversity — We value an open exchange of ideas while respecting each individual regardless of sex, race, creed, age, national origin, physical ability, or sexual orientation.
- Student Development — We value a student-staff partnership that promotes the personal and educational development of Indiana University students.
- History and Traditions — We value the role we play in preserving and promoting the rich heritage and traditions of Indiana University.
- Balance — We value the balance that every associate must create for themselves as they establish the many roles they assume in their life.

## **Principles**

- Customer Service — We will deliver superior customer experiences.
- Effective Communication — We will work together to establish and maintain effective communication links among all associates.
- Continuous Improvement — We will continually improve our physical plant, products, procedures, and programs.
- Teamwork — We will work together toward common goals as mutually dependent team players.
- Empowerment — We are committed to enhancing our organizational effectiveness by supporting associates who accept the responsibility for decision-making that affects their work environment.
- Training and Development — We are committed to providing effective training experiences to develop and retain motivated associates.
- Financial Performance — We are committed to providing financial resources to support the broader mission of Indiana University while maintaining employment opportunities for associates.

## **SITUATIONAL ASSESSMENT**

An effective strategic planning process requires, as a first step, an honest and critical situational assessment of the organization's current internal and external environments. Such a process is often labeled a SWOT Analysis. A SWOT Analysis is an effective method of identifying an organization's strengths and weaknesses and examining the opportunities and threats faced as an organization. Oftentimes carrying out an analysis using the SWOT framework will be enough to reveal changes that can be usefully made even during the midst of the planning process. In January 2006, the management team of the Indiana Memorial Union engaged in this comprehensive situational assessment. Care was taken that the analysis be honest, critical, and supported by data whenever possible.

### **Internal Strengths**

- Dedicated staff
- Beautiful physical plant and grounds
- Good reputation for quality
- Availability of food service
- Availability of entertainment (i.e. Union Board film series)
- High level of customer service
- Positive relationships with local hospitality partners (i.e. CVB)
- Size and total square footage of building
- Strong capabilities and performance in hotel and conference areas
- Good relationship with and exposure from Association of College Unions International

### **Internal Weaknesses**

- Physical location on campus
- Technology
  - ✓ On-line / Web presence
  - ✓ Availability of user technology (i.e. in meeting rooms)
- Building circulation (flow and design)
- Age and failing condition of facilities and equipment
- Internal signage and way-finding
- Students perceive the Union as "museum-like"
- Not perceived as impacting student leadership
- Parking perceived as limited and costly
- Departmental "tunnel vision" (silos)
- Food service options for hotel guests
- Programming to drive traffic in the Union
- Lack of benefits for hourly employees could hurt competitiveness in recruitment and retention
- HR processes
  - ✓ Cumbersome hiring process
  - ✓ Low employee morale in some departments
  - ✓ Limited training & development available
  - ✓ Professional development opportunities inconsistent among departments

- Financial challenges
  - ✓ Revenue / budget model out of balance
  - ✓ Non-optimized financial productivity in some areas
  - ✓ Inconsistent knowledge throughout the Union of IU financial processes
  - ✓ Underdeveloped retail model (i.e. POS)

### **External Opportunities**

- Increase and broaden type of programming available in and out of the Union
- Partner with Student Activities Office to improve student experience in the Union
- Develop student involvement/leadership opportunities throughout organization
- Analyze space utilization and possible reutilization
- Activate rooms and building with class scheduling during periods of low-use
- Refine parking improvement strategies
- Refine food service strategies
- Introduce RPS meal plan usage in Indiana Memorial Union food service
- Market / position Indiana Memorial Union to build campus awareness
- Further niche in high level of customer service
- Utilize objective data for decisions (consulting, EBI non-user survey, etc.)
- Proposal for student fee to better serve students

### **External Threats**

- Increase of local hospitality facilities (i.e. hotels, convention center)
- Campus expansion away from Union
- RPS food service expansion across campus and without Indiana Memorial Union impact analysis
- Increase in “activity” centers (i.e. Rec Center, Library, Eigenmann)
- Student lifestyle changes making the Union less relevant
- Financial
  - ✓ Loss of financial reserves for Union purposes
  - ✓ Rents and university support in non-hospitality areas being reduced
  - ✓ Increased compliance cost with federal, state and university regulations (i.e. FLSA, ADA, background checks, overhead)
- Overly restrictive administrative oversight and policies
- Lessened autonomy to respond to growth of “e-commerce”

## **STRATEGIC PRIORITIES, GOALS & OBJECTIVES**

After completing the SWOT Analysis, and with all previous strategic planning work also completed, the Indiana Memorial Union formed a cross-functional team of staff and students to develop Indiana Memorial Union Strategic Priorities, and to review its Vision and Mission relative to those Priorities. These priorities were reviewed and adopted by the Union's executive committee, and in January 2007 the executive committee developed Goals and tactical Objectives to achieve these Priorities.

The eight Strategic Priorities for 2007–2012 are:

- Position the Union as central and relevant to student life
  - Improve ease of use of Indiana Memorial Union services, programs and facilities
  - Decrease over-reliance upon hospitality revenues
  - Increase competitiveness in the hospitality business
  - Implement a comprehensive human resources program
  - Improve food service offerings to fulfill customer demand
  - Improve programmatic offerings to entertain, build community, and activate the building
  - Reevaluate space utilization and allocation to assure building offerings match strategic objectives and campus needs
- 

### **Strategic Priority: Position the Union as central and relevant to student life**

#### **Goals:**

1. Develop an integrated marketing plan and campaign to communicate the “central and relevant” position
  - a. Research (i.e. focus groups, surveys) to discover what “central and relevant to student life” means to target audiences listed in (August 2007)
  - b. Review programs, products, and services against target audience's definitions of “central and relevant” (Spring 2008)
  - c. Identify media to communicate position through the promotion of programs, products, and services (Fall 2008)
    - Utilize the most effective, measurable communication tools possible (i.e. email, web) to communicate position
    - Measure the R.O.I. of communication tools based on real data (i.e. web site hits, communication follow-through)
2. Create a more student-friendly environment that is relevant and supportive of contemporary student life
  - a. Identify areas in the west end of the building for renovation (i.e. South Lounge, Commons and Commons corridor, MO84 hallway, Back Alley, Kiva) (Spring 2008)
  - b. Improve wireless signal, cell phone signals, and other technologies being used by today's digital students (Fall 2008)

- c. Invest in softer seating, and contemporary colors and lighting that appeal and welcome today's students (January 2009)
  - d. Reconsider, reorganize, and invest in art and visual imagery that are more relevant to today's students and support our artistic mission (June 2008)
  - e. Identify areas throughout the building to showcase and give prominence to students and student leadership (Fall 2008)
3. Give prominence in high traffic areas to campus partners and services that are central and relevant to student life and fit the Union mission
    - a. Identify relevant services needed and desired in the Union (October 2008)
    - b. Recruit identified services to the Union or create services in partnership with other campus partners (establish, for example, "satellite" locations in high visibility areas for Student Activities Office, Recreational Sports, etc.) (February 2009)
  4. Invest in technologies that promote Indiana Memorial Union programs, products and services that are relevant and central to campus life
    - a. Allocate resources during budget planning to support communication technologies to reach potential customer base (those not currently using the facility) (2008)
    - b. Develop communication systems to inform building customers (September 2007)

**Strategic Priority: Improve Ease of Use of Indiana Memorial Union Services, Programs and Facilities**

**Goals:**

1. Develop, fund and implement a comprehensive internal and external way-finding system
  - a. Employ a consultant to evaluate the needs for way-finding (Spring 2007)
  - b. Develop implementation plan and appropriate budget to support (Summer 2007)
  - c. Explore the use of electronic direction-finding and information systems (Summer 2007)
  - d. Begin implementing permanent system (Spring 2008)
2. Create and support a central access point for information distribution and service delivery support
  - a. Develop a cross functional team to identify various needs of the organization and estimate associated costs (Spring 2007)
  - b. Review recommendations and develop action plan and budget (Fall 2007)
  - c. Implement recommendations (Summer 2008)
3. Establish cross-functional team to evaluate and improve parking and transportation options to provide easy access to the building

- a. Explore options to increase foot traffic into the Union (Summer 2007)
  - b. Provide options for alternative forms of transportation ( Spring 2008)
  - c. Review payment options for parking (Fall 2007)
  - d. Request involvement in campus conversations regarding transportation and campus traffic patterns (Spring 2007)
4. Provide additional options to access Indiana Memorial Union products and services
- a. Develop more options for online access to products and services (Spring 2008)
  - b. Increase availability for on-line payments (Summer 2008)
  - c. Work with RPS and other appropriate units to create a mutually beneficial program among separate food service operators (Summer 2008)
  - d. Create marketing strategy to promote a new plan (Summer 2008)
5. Establish computer kiosks in all major retail outlets and high impact areas (Fall 2008)
- a. list Indiana Memorial Union home page as default page
  - b. Offer links for hours of operation for all businesses; services available; upcoming special events; nutrition information and Union Plus sign-up

**Strategic Priority: Decrease Over-Reliance upon Hospitality Revenues**

**Goals:**

- 1. Develop “case statement” for increased reimbursements (Fall 2007)
  - a. Department office rents
  - b. Student Activities Tower student organization space rents
  - c. Meeting room usage
  - d. HPER and other academic use
  - e. Restoration of institutional support for student life
- 2. Obtain CFR support for dedicated student fee for the Union’s operations (July 1, 2007)
  - a. Initiate discussion with Union Board and others to gain support (Spring 2007)
- 3. Develop a plan for existing retail space that serves the campus and maximizes revenue (Spring 2008)
  - a. 900 Hair Design
  - b. Delights
  - c. Sycamore Corner
  - d. Former STA Travel space
  - e. Others as identified

## **Strategic Priority: Increase Competitiveness in Hospitality Business**

### **Goals:**

1. Evaluate current status of revenue vs. non revenue-generating spaces
  - a. Analyze and develop plan for refurbishment of function spaces and public spaces (i.e. Alumni Hall, hotel lobby and hotel hallways) (2008)
2. Evaluate and modify staffing allocations to support hospitality functions
  - a. Analyze sales and conference staffing (i.e. potential addition of PA staff person to support conference coordination and Sales efforts) (Summer 2007)
  - b. Address operational staffing during weekends and evenings (i.e. potential visible point person and/or process) (Fall 2007)
  - c. Improve overall image and professionalism of staff (i.e. uniforms, appearance, behavior) (ongoing)
  - d. Work with IATSE to increase the Union's responsibility for A/V and sound support (2008)
3. Evaluate hospitality amenities and services to enhance guest experiences
  - a. Assess regional competition and determine expected amenities and services and feasibility of offering them (i.e. valet parking, sauna, pool, turndown service, wine & cheese bar, event monitors, signage, dedicated hotel TV channel, pay per view, business center, complimentary champagne for bride and groom) (ongoing)
4. Enhance and/or Expand the Indiana Memorial Union Conference Experience
  - a. See ways to enhance conference offerings with Indiana Memorial Union programmatic capabilities (2008)
5. Evaluate the Union's position within regional hospitality market to increase the Union's market share
  - a. Become AAA rated (Spring 2007)
  - b. Further develop online booking options (i.e. Priceline, Expedia, Hotels.com) (Summer 2007)
  - c. Develop attractive hospitality "packages" (i.e. Conference, wedding, special event such as football, graduation) (Fall 2007)
  - d. Develop a joint marketing plan for catering and meeting services (Spring 2007)

## **Strategic Priority: Implement a Comprehensive Human Resources Program**

### **Goals:**

1. Streamline the employee hiring process
  - a. Examine the current Indiana Memorial Union's hiring process to improve efficiency and effectiveness (Spring 2007)
  - b. Explore with IU Human Resources the redesign of the current application for hourly employees (Summer 2007)

- c. Utilize technology to post jobs on the Union's Web site, create an online application, and create computer kiosks for applicants to apply for open positions (Fall 2007)
2. Fund a training position and develop a comprehensive training program (2008)
    - a. Create an organized orientation program by re-evaluating the current general purpose training and exploring options for a more comprehensive building tour
    - b. Help new employees feel more connected to the Union through new employee events, welcome kits (pens, phone list, post-its), and monthly new-staff emails
    - c. Work with supervisors to develop department/role-specific training by utilizing "train-the-trainer" type programs
    - d. Promote training opportunities provided by IU human resources
    - e. Plan for employee training and development opportunities in the Indiana Memorial Union budget process
  3. Improve employee retention
    - a. Implement new employee recognition programs (Spring 2008)
    - b. Establish performance management reviews (Fall 2008)

**Strategic Priority: Improve Food Service Offerings to fulfill Customer Demand**

**Goals:**

1. Develop a Union Plus marketing plan (Spring 2007)
2. Explore Café a la Carte concept at Education building and other campus locations (Spring 2007)
3. Increase sales during "shoulder" and off-peak times (Spring 2007)
  - a. Explore marketing opportunities to promote "shoulder" and off-peak times
  - b. Establish committee (i.e. Union Board, Student Activities Office, Indiana Memorial Union staff) to propose methods of promotion
  - c. Offer coupons, themed events and special Tudor Room opportunities
4. Improve communication about hours of operation and services for dining and all retail outlets (Fall 2007)
  - a. Standardize the format of hours of operation for each location and post alternative locations on signage when closed
  - b. Post service point hours at all Union map locations, and in Library and Education operations
  - c. Offer dining services guide in each hotel room and at Front Desk
  - d. Continue Web-based hours of operation
  - e. Update Web-based menu and service listings
5. Lay foundation for successful renegotiation to extend dining services contract with Sodexo based on evidence of success (ongoing)

- a. Utilize data, such as student satisfaction results
- b. Continue to improve financial position and returns
- c. Negotiate capital investment to improve space and overall program
- d. Update understanding of new food options based on national trends, local focus groups, and customer surveys
- e. Continue building and strengthening relationships campus-wide

**Strategic Priority: Improve Programmatic Offerings to Entertain, Build Community, and Activate the Building**

**Goals:**

1. Assess Indiana Memorial Union offered programs
  - a. Evaluate what is currently offered and what is not offered but desired (Spring 2007)
  - b. Create internal financial “grant funds” for Indiana Memorial Union units to develop programmatic offerings within the Union (Spring 2007)
  - c. Develop intentional programs that are central and relevant to student life and respond to assessment results (on-going)
  
2. Create and improve existing partnerships with campus departments and organizations
  - a. Evaluate facility usage policies to make Indiana Memorial Union spaces more accessible for student life programming (Summer 2007)
  - b. Develop promotional materials specific to on-campus colleagues (Fall 2007)
  - c. Reorganize existing position(s) for creative campus outreach and building programmatic enhancement [i.e. serve on campus committees, plan events like “Taste of the Union,” invite groups to collaborate with existing Union programs] (2008)
  
3. Make decision to remodel, relocate, or remove recreation center area
  - a. Assess student needs and wants among current users and non-users (Summer 2007)
  - b. Conduct SWOT analysis of current recreation space (Summer 2007)
  
4. Explore opportunities for greater collaboration between Student Activities Office (SAO) and Indiana Memorial Union Activities & Events
  - a. Consider proposing to Vice President new organizational structure(s) and/or reporting lines among program and student life units within Student Affairs (Fall 2007)
  - b. Work with SAO to increase their building visibility, with possible office relocation (on-going thru Summer 2008)

**Strategic Priority: Reevaluate space utilization and allocation to assure building offerings match strategic objectives and campus needs**

**Goals:**

1. Inventory current space allocation and usage relative to the Indiana Memorial Union Vision, Mission, Values, Principles and all Strategic Priorities, and make changes to building where feasible
  - a. Analyze user categories by square footage: departments, leases, public space, storage and building support, kitchens and food service, student offices and student life program support (Summer 2007)
  - b. Work with an appropriate academic class (i.e. Higher Education) to conduct a “climate assessment” to learn if students feel connected, engaged and safe as described in Indiana Memorial Union Vision (Fall 2007)
  
2. Assess campus needs for space and functionality for use in annual decision-making and building master planning
  - a. Conduct focus groups with student organizations housed in the Union and not housed in the Union (Spring 2008)
  - b. Administer statistically reliable survey of students, faculty and staff (Spring 2008)
  
3. Implement feasible building improvements identified in Brailsford & Dunlavey, Envision Strategies and various Indiana Memorial Union reports; incorporate flexible design where possible. Improvements. Improvements to be considered specifically, but not limited to:
  - a. Develop exterior adjacent spaces (i.e. Solarium patio, outside IUOA, Kiva entrance) (Summer 2007 / ongoing)
  - b. Identify offices that could move to new Union locations to better streamlines processes and improve service (Summer 2008)
  - c. Analyze best uses for mezzanine west end of building to support student life (i.e. recreation and adjacent areas) (Summer 2008)
  
4. Initiate building master plan for future building needs (2011)
  - a. Work with IU Architect’s Office to hire a consulting firm to facilitate process
  - b. Utilize existing work related to Strategic Plan space priorities

## **HISTORY**

The history of the Indiana Memorial Union is rich and rare among the nation's college unions. Though the Indiana Memorial Union must continually change to meet the needs of students, faculty, staff, alumni and guests; it must also remember its past and serve as a bridge between the past and the future.

### **The Program**

A union that would “promote the interests of Indiana University and its students” was the idea of John Whittenberger and his friends, when, in **1909**, they persuaded President William Lowe Bryan and members of the faculty to aid them in establishing the organization that they named the “Indiana Union.” President Bryan recognized the need for bringing the campus together when he stated “in such a university as ours there are many tendencies making toward diversity. The Union should be a great force working toward unity of university spirit and life.”

The increasing all-male membership was allotted rooms in the Student Building where they installed a barber shop, pool and billiards equipment, and club rooms. Gradually, they added a piano, sponsored social functions, and subscribed to out-of-town newspapers for student use. They entertained the many visitors who came to the campus at the yearly commencements and sponsored a hospital fund for members.

In **1910**, the founder, John Whittenberger, died of Typhoid Fever. The founder and first president of the Union Board of Directors was kept in the memory of those who followed by placing his name on a room in the original building and later—the auditorium on the first floor of the Biddle Continuation Center addition.

During **1912**, alumni receptions were sponsored; Indiana cheers were printed for student use; and the Union entertainment series was inaugurated. Each of these programs later developed into the Student Alumni Council, Student Athletic Board, and the IU Auditorium series. The first popular motion picture show to be installed on a college campus was introduced by the Indiana Union in **1915**. Approximately one year earlier, the Union introduced the first play-by-play coverage of a collegiate baseball game, serving as a springboard for the Union's popular grid graft, which reported IU's play-by-play action for away football games. The Indiana Union kept pace with the roaring twenties. The Jordan River Review recapped the school year in comedy complete with an all-male chorus line. The base for an extensive art collection was laid in the twenties when the Union acquired its first T. C. Steele painting. Pep sessions were organized for the campus. During the twenties, mandatory membership dues became a part of each man's tuition, automatically making each male student a Union member.

In **1932**, in spite of the Great Depression, the Union began co-sponsoring dances with the Association of Women Students, which would continue into the early fifties. Another tradition began in **1935**—the first Union Board Biennial Reunion.

The **1940s** and World War II saw programming becoming less important. Still an all-male organization, the Union sponsored free movies for soldiers along with Friday night mixers. After the war, Union Board was back in full-fledged programming, including the popular concert series, the fall carnival, the rhythm room night club, and the opening of the formal season dance.

The **1950s** ushered in important changes. In **1952–53** women were admitted to Union Board with the merging of the Association of Women Students into Union Board. During this period, Madrigal Dinners, Santa Wells, the Easter parade, fall carnival, campus quiz bowl, and the barbeque were big programs. Also, Union Board sponsored the IU Soccer Club, the cheerleaders, and equipped the Union's craft shop.

Lycea dinners, art displays, childrens' matinee series, pop concerts, movies, and the Miss IU pageant were a few of the programs introduced in the **1960s**. In the **1970s** popular concerts reached its apex by offering performances by Bob Dylan and the Rolling Stones. Free University, Hoosierfest, Dusk till Dawn, bluegrass festivals, and the Midwest's first discotheque, Club Lutrec, were popular offerings. It was also during the late seventies that a program was initiated through alumni to endow scholarships for Union Board directors and committee members.

The **1980s** saw the Union's alumni organization formalized with the founding of the John Whittenberger Society. Alumni financial support for scholarships and Union Board equipment had increased. Lectures had become increasingly popular—major lectures, alumni lectures, and time out Thursdays (faculty lectures). New commitments to diversity, multicultural programming, faculty connections, and building community could be found. Video connections and UBTv reflected the interest of students in all aspects of video.

Cooperative programming with other departments on campus, mystery dinners, jazz concerts, club concerts, popular concerts, comedy, student musical productions, daytime programming, and Live From Bloomington are just a few of the programs that Union Board introduced in the **1990s**. Target marketing and specialized programming were trends—meeting the needs of the changing student seemed to be the focus.

The 21<sup>st</sup> Century has led to remarkable growth in the use of technology to market programs and reach the campus. Important traditional programs have continued to be popular—Live From Bloomington, Lectures, Concerts—but the mechanisms used to market these programs have changed dramatically with the introduction of Facebook.com, MySpace.com, and the use of Apple's iPod music listening devices and internet-based music downloading services (such as Kazaa.com, Napster.com, iTunes.com, Ruckus.com) to promote programs.

The astounding growth and influence of the Indiana Memorial Union can be attributed to two factors: support from the University for its mission and ideas plus the attraction of outstanding students to its leadership positions. Included among those who served on the Board of Directors are a candidate for the President of the United States, a Governor of Indiana, a Justice of the Supreme Court, a member of the U.S. House of Representatives, a Justice of the U.S. Court of Appeals, a Chancellor of Indiana

University, a U.S. delegate to the United Nations, and hundreds more successful lawyers, physicians, educators, politicians, and professionals who distinguished themselves. For many years in the late '70s and early '80s, the majority of the Board of Trustees were former Union Board directors.

Today, the Indiana Memorial Union continues to fulfill William Lowe Bryan's dream of a "great force making toward unity of university spirit and life."

### **The Building**

Although Indiana University was precocious in creating and fostering a student union, many other colleges had passed it by in building a separate building specifically for a union. After World War I, with a greatly expanding student population, the need became acute—the student building space had been outgrown. In **1921**, the memorial fund drive was started to raise money for a much-needed union building. Ten years passed before the Indiana Memorial Union was dedicated on Commencement Day, June 13, **1932**, to "the sons and daughters of the university who have served in the wars of the Republic." The original building (west wing) cost \$1,094,447 and it contained 103,397 square feet of floor space. Included in the structure were food services, billiards, public lounges, meeting rooms, banquet rooms, student offices, administrative offices, a bookstore, a large ballroom (Alumni Hall), and 14 "sleeping rooms" on the sixth and seventh floors.

Although Indiana University was precocious in creating and fostering a student union, many other colleges had passed it by in building a separate building specifically for a union. After World War I, with a greatly expanding student population, the need became acute—the student building space had been outgrown. In **1921**, the memorial fund drive was started to raise money for a much-needed union building. Ten years passed before the Indiana Memorial Union was dedicated on Commencement Day, June 13, **1932**, to "the sons and daughters of the university who have served in the wars of the Republic." The original building (west wing) cost \$1,094,447 and it contained 103,397 square feet of floor space. Included in the structure were food services, billiards, public lounges, meeting rooms, banquet rooms, student offices, administrative offices, a bookstore, a large ballroom (Alumni Hall), and 14 "sleeping rooms" on the sixth and seventh floors.

In **1939**, the North Lounge, now the IMU Gallery, was added to the original structure. The South Lounge, originally a men's lounge, had become available for both sexes. Therefore, in response, the Indiana Union (all men) endorsed a proposal to build a separate lounge for men only.

The Biddle Continuation Center addition, the largest addition to the Union, was completed in **1959** after eight years of planning and three years of construction. Containing approximately 371,902 square feet, the cost for construction and equipment was \$11,707,362. The addition was dedicated to the memory of the Union's first director – Ward G. Biddle. Its special function would be to support continuing education "to meet the needs of alumni and other citizens of the state and nation."

Included in the Biddle Continuation Center project were the following: a bowling alley; craft shops; rifle range; solarium; shuffle board courts; outdoor terrace; Tudor Room;

IMU Cafeteria; private dining rooms; three production kitchens; beauty shop; barber shop; games room; 180 guest rooms; lounges; meeting rooms; University Club; post office; administrative offices; and the Conference Bureau.

In **1961**, the Memorial Room was established as a permanent place for certain valued mementos of the past and as a permanent reminder that the building was originally conceived as a memorial.

In **1987**, after two years of preparation, a strategic planning document, "Plan 2000", was completed and shared with the university administration. In November, **1988**, approval was received from the administration for a \$19,000,000 renovation of the building—the first major renovation of the building since the 1959 addition. Phase I of the renovation, finished in **1994**, completely refurbished all guest rooms, major conference rooms, and repaired and upgraded the infrastructure (life-safety codes, electrical, plumbing, HVAC, roofing, and windows).

During **1997–98**, with the total cost of the project reaching \$23,000,000, the final phase was completed. Included were the installation of fire protection systems and the upgrading of heating, air conditioning and electrical systems from the East Lounge to the west tower and Alumni Hall. In addition to the student and staff offices in the west tower, the Hotel Lobby, East Lounge, Frangipani, Tudor, Federal, and Georgian Rooms were completely refurbished. Throughout the project, great care was taken to protect and preserve the traditional and historical ambience of the Union.

Since the completion of the \$23,000,000 renovation project, the Indiana Memorial Union has continued to improve its facilities. Approximately \$1,350,000 was spent to upgrade the retail food facilities located on the mezzanine level of the building. A full service Burger King was installed in the Commons area and the old Union cafeteria was converted into a food court format featuring a Pizza Hut Express, sub sandwich shop, blue plate special format, and several grab and go items. In the Summer of **1999**, the Union partnered with Residential Programs and Services in marketing an optional Indiana Memorial Union meal point plan with housing contracts. As a result of the new service formats and the Indiana Memorial Union meal point plan, customer counts and revenue increased more than 20% when compared to the preceding year. With the new investments in the mezzanine retail food outlets, the contract with Sodexo was extended to **2008**.

Other major investments after the renovations include room finishes and furnishings for the student office space in the Student Activity Tower, \$500,000; office space and gift shop (Sycamore Corner), \$150,000; and Back Alley, \$125,000.

The Indiana Memorial Union also developed a seven-year replacement cycle for carpets, bedspreads, and mattresses in the hotel. From 2000-02, more than \$400,000 has been spent to replace corridor carpets, wall coverings, and the room carpets, bedspreads, and mattress box springs.

Also from 2000-02, \$140,000 has been invested in a new front office system for the Hotel and a new meeting room reservations system. During the Summer of **2001**,

approximately \$230,000 was spent on refurbishing the steps leading to the Commons north entrance. Another \$200,000 was earmarked to refurbish the corridors located on the lobby, mezzanine, first, and second floors.

In **2000–01**, the permanent art collection in the Indiana Memorial Union received six paintings by Curry Bohm from the estate of Robert Lucas. Three new pieces of art were purchased to provide more diversity in the Union art collection. The Tudor Room tapestries were also cleaned and restored.

Through the years, the name of the 1959 addition, the Biddle Continuation Center, confused the general public and guests of Indiana University. The original name did not mention a hotel and that omission was a deterrent to the guest rooms being listed in the AAA guide. In **2002**, the university approved changing the name to “The Ward G. Biddle Hotel and Conference Center”.

In **2002**, the main restrooms adjacent to the Commons were completely redesigned and renovated to better serve today’s student population. Exterior improvements included the redesign and landscaping of the Circle Drive entrance and redesign of the garden outside the Tree Suites corridor on the south side of the hotel. At the end of the Summer, **2003**, the garden became available for outdoor receptions and meetings. Plantings for the new garden came from the private garden of Liz and Winston Shindell.

The years **2003-05** allowed the Union to focus on investments in hospitality spaces with renovations to the Dogwood Room, a new Biddle Hotel & Conference Center sign on Seventh Street, and upgrades to hotel amenities and spaces. In **2006** the Whittenberger Auditorium was renovated with new seating, floor covering, wall covering, lighting and ceiling paint, acoustical tiles, and a new audio-visual package usable for both conference guest and Union Board films. Additional renovations included relocating the IU Outdoor Adventures program from the first floor to the mezzanine level to locate it near other student life/recreation activity; a cosmetic upgrade to Sugar & Spice, repositioning the concept to organic, fair-trade and fresh products (retaining traditionally well-loved baked goods); and the installation of a Starbucks Coffee operation adjacent to the first floor IMU Gallery (North Lounge) so that a new and contemporary food service operation that nurtures student programming space could be created. Significant objectives of the 2006 renovations included to a desire to create move activity within the building, offer more contemporary spaces and products for today’s students, and to simultaneously preserve the architectural integrity of the historic Indiana Memorial Union facility.

### **The Conferences**

Historically, the Indiana Memorial Union has always been designated as a support service for the continuing education program at Indiana University. The original **1932** structure contained private dining rooms, meeting rooms, and guest rooms that were used by faculty and staff for educational meetings sponsored by university departments.

The completion of the Biddle Continuation Center in **1959** marked a significant financial commitment by Indiana University to provide an on-campus location to extend the

educational processes of the institution to meet the needs of alumni and other citizens of the state, the nation, and today—the world. With the addition of guest rooms, meeting rooms, food services, and the development of the Conference Bureau, the University had a facility on campus that would bring the faculty and other assets of the university to meetings and conferences that could be held throughout the year. This plan also allowed the university to maximize its use of facilities. During the day, meeting rooms could be utilized primarily by conferences with the same space being available to student organizations during the evening. Revenue generated from conferences and the guest rooms, the food service, the Bookstore, and other retail outlets could be used to offset the costs of non-revenue producing programs and services. Therefore, student fee increases to offset the cost of operations could be minimized.

During the development of “Plan 2000”, in **1987-88**, the mission of the Indiana Memorial Union was changed to reflect that the Union would “serve as a conference center for the Bloomington campus of Indiana University.” It is important to note that the conference support functions do not only contribute to Indiana University, they also contribute to the local economy. By policy, all conferences using Indiana University facilities must be routed through the Conference Bureau and any exception must be obtained from a university committee. Organizationally, the Conference Bureau was not a department of the Indiana Memorial Union. However, it was in fact the sales arm of the Union for all group business that stays overnight.

In the Summer, **2002**, Indiana University Conferences became a unit under the organizational umbrella of Auxiliary Services and Programs. Because the Indiana Memorial Union is also a unit under the same umbrella, a closer and more productive partnership was anticipated that should produce an increase in guest room rentals from conference bookings.

In **2005** Indiana University Conferences was made a unit of Residential Programs & Services rather than a separate reporting unit to the Vice Chancellor for Auxiliary Services & Programs. With the 2006 University reorganization in which the Division of Auxiliary Services & Programs was folded into the Division of Student Affairs, this IU Conferences reporting structure continued. Also, in 2005, Beck Chapel scheduling and oversight was moved from the Office of the President to the Indiana Memorial Union to capitalize on the facility scheduling and event management expertise of the Union staff.

### **The Food Service**

In financing the **1932** and **1959** construction, self-liquidating bonds were sold. The bonds were secured and retired by student fees and operating income. Cash food sales were expected to not only provide a series of outlets to satisfy the many needs of the campus community, food was also expected to cover direct and indirect costs in addition to being a positive contributor to the overall Indiana Memorial Union budget.

A review of a departmental summary of actual income and expenses for **1961–62** does show that the food service did generate 55.4% of the total revenue for the Union and did cover all direct and internal indirect costs assigned to it. It also produced a small, positive net of \$7,400 toward the overall net margin of \$132,000. It is important to note

that no general university overhead was charged to the Union and all social security costs and Public Employee Retirement Fund (PERF) costs were covered by the institution.

By **1970–71**, the university was still covering all costs for social security and PERF. No general university overhead was being assessed against the Union. Food service still generated 54.9% of the total revenue, but had become a negative net contributor in the amount of -\$79,490 when all direct and Union indirect costs were assigned to it. During the period **1970–1986**, several factors had a continuing negative impact on the profitability of the Union food service. Off-campus competition exploded with the arrival of the fast-food chains, social security and PERF costs were no longer being absorbed by the general fund of the university, and general university overhead charges were being assessed for the first time. Demands for consistent, up-scale catering were increasing from faculty, administration, and conference planners. Several of the cash food outlets needed refurbished with new menus and approaches to service. The Union food service was faced with the situation of having no capital available to put back into the food outlets and no human resources who could consistently produce an acceptable up-scale catered function.

In the Fall of **1987**, the consulting firm of Lavenhol and Horwath was contracted to determine whether or not the Indiana Memorial Union food service operations were fulfilling their mission statements. If not, what steps would be necessary to bring the food service into conformity with its mission statement. They were also instructed to list the advantages and disadvantages of contracted food service at the Union.

As a result of the Lavenhol and Horwath findings, a decision was made to invite commercial food service companies to make a proposal for the operation of the cash food service at the Indiana Memorial Union. The final objectives whether self-operated or contracted were three-fold: improved product; improved service; and an improved bottom line.

From the Spring of **1988** through the Spring of **1989**, a Request for Proposal, invitation to bid, and an evaluation of bids were completed. A final decision was made to contract the Union food service and to negotiate a contract with the Marriott Corporation. The contract was signed on December 14, **1989**, with Marriott assuming management responsibility of the food service on December 17, **1989**. The contract with Marriott was extended for five years effective December 17, **1996**.

As a result of a buyout, Marriott became Sodexho Marriott, and in **2001** the company became Sodexho. With the reinvestment of \$1,100,000 in the retail food services located on the mezzanine level of the Union, the contract with Sodexho was extended to **2008**.

### **The Finances**

The Indiana Memorial Union construction sinking fund has been completely funded from student-dedicated fees since the original structure (**1932**) was financed. Student-dedicated fees have historically funded most of the activities account and a portion of

the operations account. The remainder of the activities and operation accounts have been funded through operating revenues.

Before **1977–78**, a lump sum student-dedicated fee was assessed each semester and broken down into allocations for various construction-sinking funds and the Union operational support. Beginning in **1977–78**, the campus changed from a lump sum semester dedicated fee to a system whereby the dedicated fees were assessed on a credit hour basis. The amount of student fee support for Indiana Memorial Union operations was increased significantly when this change was made, rising from \$334,538 in **1976–77** to \$602,040 in **1977–78**.

Enrollment declines after **1977–78** caused the annual supplement for Indiana Memorial Union operations to decrease to \$530,202 by **1979–80**. For the next five years the annual support for Indiana Memorial Union activities and operations was held constant. It was also during this period that the Union began paying for PERF and OASI (formerly funded through the general fund). The high inflation rates of the early **1980s** combined with the constant student fee support and the responsibility for covering OASI and PERF had a very negative impact on the Union's ability to meet all of its operating expenses while keeping, and in some cases, expanding the level of programs and services.

During the six years when student fee support of the Union was held constant and the preceding factors were in place, the Union operating budget began to accrue significant deficits. To help alleviate the situation, the Union was given the income from the adjacent parking lots. By June 30, **1991**, the negative cash balance had been eliminated.

On a longer term basis, in **1984–85**, the problem of providing for the annual inflationary cost increases to operate the Union was partially resolved. It was recommended that the annual income and support designated for the Union be included in the campus' General Fund Budget rather than funding from student fees. The campus accepted this suggestion and the change was made beginning with the July 1, **1985**, budget. With the change, that portion of the dedicated fee income designated for the Union was reported as general fund income and a like amount included as a general fund expenditure line designated for the Union. If this change had been implemented five years earlier, the Union would have experienced considerably less difficulty with its operating budget and would not have had to defer some needed maintenance, repairs, and refurbishing.

By December, **1992**, the \$750,000 overdraft had been eliminated. It should also be noted that additional support for Indiana Memorial Union operations from the campus had been reduced from a high of \$313,882 in **1986–87** to zero in **1990–91**.

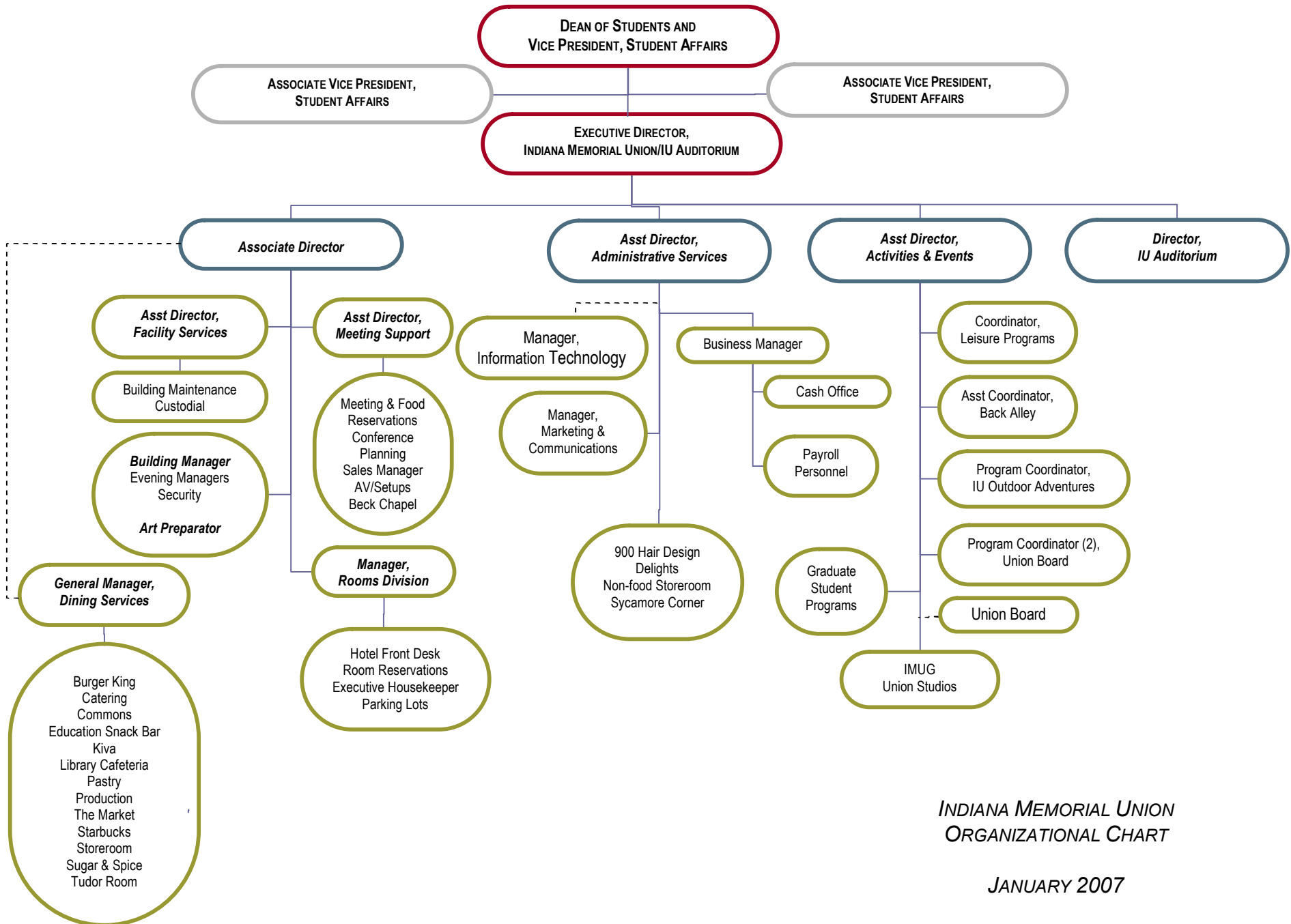
In recent years, budget problems for the greater university have greatly reduced the financial support for Indiana Memorial Union operations. In **1997–98**, campus support for Indiana Memorial Union operations reached a high of \$711,147. In the following years the support has been declining: \$560,814 in **1999–2000**; \$410,914 in **2000–01**; \$286,740 in **2001–02**; and \$165,000 in **2002-03**. Since 1981, student fees/campus support for Indiana Memorial Union operations has averaged around 10% of the

operating budget. In **2002–03**, that percentage had dropped to 2.3%, and by **2006–07** that support had dropped to 2%. From 1994–95 to 2006–2007 the Union’s dependency on hospitality revenue generation (hotel, food service, meeting services, parking) had increased from 54% to 71% of budget. When all auxiliary sources are combined (hospitality, retail, space rental) the Union reached a level of 98% self-funding in 2006.

### **The Governing Structure**

As previously noted, the Indiana Memorial Union was founded by a student, John Whittenberger, in **1909**. The original building and additions were inspiring to each generation of students who continued and increased the number of programs and services that would, as the founders had written into the constitution, “promote the interests of Indiana University and its students.” Historically, students have always had significant power in shaping Union policies and programs. The governing body called the “Indiana Memorial Union Board” is currently composed of sixteen students (half elected and half selected) plus an alumni, faculty, and administrative representative. The Director of the Indiana Memorial Union also sits on the Board. Each member has one vote.

In April, **1974**, the constitution of the Indiana Memorial Union was ratified by the Board of Trustees. Article III, Section 4, of the constitution states that the Board of Directors (Union Board) may recommend to the Director of the Indiana Memorial Union budget changes and/or additions concerning the budget of the Indiana Memorial Union. The Board is also empowered to direct the policies and activities of the Indiana Memorial Union and shall maintain all records thereof. Article IV, Section 1, of the same document notes that the Director is employed by the Trustees of Indiana University and is responsible to the same body. The Director will “have charge” of the business policy and the financial management and through the Executive Committee and in conjunction with the Board, be responsible for an adequate program of activities and administer the house rules and by-laws as established in Article III, Section 4, of the Indiana Memorial Union Constitution.



**INDIANA MEMORIAL UNION  
ORGANIZATIONAL CHART**

*JANUARY 2007*