Pathways to Excellence

RESILIENCE AND INNOVATION
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*CIC gratefully acknowledges the generous support by EAB of travel grants that make it possible for presidents of institutions with limited resources to participate in the Presidents Institute.

*CIC is grateful for the substantial and continuing support of Academic Search, Inc. and the American Academic Leadership Institute (AALI).

*CIC also appreciates the support of Santander Universidades and Universia for the participation of rectors of Mexican universities.

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STAYING CONNECTED

Download Guidebook, The Free Conference App
Access the latest Institute information, participant lists, session handouts, and more.

1. Download Guidebook from the Apple App Store or Google Play Store, or visit https://guidebook.com/g/2018PresidentsInstitute.
2. Open the app and tap the Enter Passphrase button located near the top of your screen.
3. Type 2018cicpi and tap the Continue button.
4. Tap the Get This Guide button. (The guide may take a few minutes to load.)

Wireless Internet Access
Complimentary Wi-Fi is available in all meeting rooms of the Diplomat Hotel. If you need assistance, please ask at the CIC Registration Desk.

Network Name: CIC_PI_2018
Password: 2018cicpi

Follow the Institute on Twitter
Participants can follow the Presidents Institute on Twitter @CICnotes and comment about the Institute using the hashtag #2018PI.
Dear Colleagues:

Welcome to CIC’s 2018 Presidents Institute. An exceptional array of speakers and sessions will explore the theme “Pathways to Excellence: Resilience and Innovation.” Independent colleges and universities have long been pioneers of new pedagogies, early responders to changes in market conditions, and nimble sentinels of social and economic challenges. Their resilience has depended on strong presidential leadership, dedicated faculties, and enthusiastic supporters. But the future of higher education is less well defined than ever and is constrained by smaller operating margins, shifting demographics, and a rapidly changing work environment. Moreover, today the leadership of colleges in preparing citizens for a more inclusive democracy is subject to ideological polarization. These challenges call for independent colleges and universities to be even more agile, flexible, innovative, and resilient.

Clear vision and fortitude are needed by presidents to lead institutions along paths that sustain excellence. How can independent college and university presidents effectively guide their institutions to embrace the challenges and opportunities they face? What criteria should presidents use to select among innovative programs and approaches? How do presidents cultivate adaptive and culturally responsive leadership within the faculty and staff? How can trustees, donors, and community and business partners be persuaded to support independent higher education? In what ways can new programs, new markets, and new approaches to teaching and learning generate revenue and position the institution for a strong future? How should a president weigh the benefits of innovation against the durability of a long-standing institutional mission and tradition?

I extend a special welcome to the many new presidents and their spouses or partners and those participating in this annual gathering for the first time. All of us hope you will find the Institute to be a richly rewarding experience.

One distinctive feature of the Institute is the substantive programming for presidential spouses and partners, which offers useful support for those who serve in this fulfilling, but at times challenging, role.

CIC is grateful to those sponsoring organizations that have contributed financially to the Presidents Institute and whose names appear on the inside front cover. Their support makes possible a more comprehensive program, and their expertise in various aspects of institutional management adds to the usefulness of conversations during the Institute. I encourage all presidents to confer with our sponsors; their guidance can be invaluable.

Please do not hesitate to call upon any CIC staff member for assistance. In this beautiful setting, may the next few days provide opportunities to learn, converse with colleagues, and relax.

Sincerely,

Richard Ekman
President
Tuesday, January 2

6:00–8:00 p.m.
Thrivent Fellows Group
Rooms 216 and 217

Wednesday, January 3

7:30–11:30 a.m.
Registration for New Presidents Program and Presidents Governance Academy
Grand Ballroom Foyer

7:30 a.m.–5:00 p.m.
Thrivent Fellows Group
Room 217

8:00 a.m.–8:30 p.m.
New Presidents Program (including spouses and partners of new presidents)
(See pages 9–13 for meeting rooms.)

8:00 a.m.–8:30 p.m.
Presidents Governance Academy
(See pages 14–17 for meeting rooms.)

Noon–5:00 p.m.
INDIVIDUAL CONSULTATIONS
(See page 20 for listings.)

2:30–4:30 p.m.
American Baptist Association of Colleges and Universities
Room 316

3:30–4:15 p.m.
Presidents Institute Spouses and Partners Task Force Meeting
Room 314

PRESIDENTS INSTITUTE BEGINS

5:00–6:15 p.m.
WELCOME AND KEYNOTE ADDRESS
“What’s at Stake for Independent Colleges in Our Turbulent World?”
David Leonhardt

Thursday, January 4

7:00 a.m.–5:00 p.m.
Institute Registration
Grand Ballroom Foyer

7:15 a.m.–3:15 p.m.
New Presidents Program (including spouses and partners of new presidents)
(See pages 9–13 for meeting rooms.)

7:15 a.m.–2:00 p.m.
Presidents Governance Academy
(See pages 14–17 for meeting rooms.)

7:45 a.m.–3:00 p.m.
CIC Board of Directors Meeting
(See page 18 for meeting rooms.)

8:00 a.m.–3:00 p.m.
Lutheran Educational Conference of North America
Rooms 212–214

8:00 a.m.–3:00 p.m.
Thrivent Fellows Group
Room 217

Noon–4:00 p.m.
Lower Cost Models for Independent Colleges
(By invitation only)
Room 317

Noon–5:00 p.m.
CIC Board of Directors Meeting
(See page 18 for meeting rooms.)

CIC PRESIDENTS INSTITUTE MEDIA POLICY

A key feature of the CIC Presidents Institute is an atmosphere of candor that allows presidents to speak freely with their colleagues. The characteristics of frank and open discussion are possible in part because the Institute is a “presidents-only” event, differentiating this annual conference from many others that presidents attend. Although the Presidents Institute is a “closed” meeting, CIC invites a few select members of the media as speakers and reporters, providing them with valuable access to the discussions and to the participants in the Institute. Journalists are welcome to attend plenary and concurrent sessions except for those marked “by invitation only” or “for presidents only,” which are closed to the media. Journalists are encouraged to write about Institute sessions and issues and are free to interview any willing speaker, presenter, or conference participant. Journalists, however, must obtain explicit permission before directly quoting speakers or participants.
6:30–8:30 p.m.
WELCOMING DINNER
Grand Ballroom

8:00–8:45 p.m.
Reception for Sponsors
Atlantic Ballroom 1

Friday, January 5

7:00 a.m.–5:00 p.m.
Institute Registration
Grand Ballroom Foyer

7:15–8:15 a.m.
Breakfast
Grand Ballroom East

BREAKFAST ROUNDTABLE DISCUSSIONS
• Battling Climate Change
• Developing Interfaith Cooperation on Campus
• Insights from Early FAFSA for College Recruitment Strategy
• Making Research Actionable for Presidents
• Using Donor-Advised Funds to Close the Fundraising Gap
• Yes We Must Coalition: College Success for All

7:15–8:15 a.m.
BREAKFAST MEETINGS
Association of Catholic Colleges and Universities
Room 320

Council for Christian Colleges & Universities
Rooms 312 and 313

National Association of Intercollegiate Athletics
Room 314

Nonmember Presidents and Member Presidents Participating in the Institute for the First Time
Room 316

8:00 a.m.–5:00 p.m.
INDIVIDUAL CONSULTATIONS
(See page 20 for listings.)

8:30–9:45 a.m.
PLENARY SESSION
“Preparing Students for Civic Responsibility”
Valerie B. Jarrett
Great Hall

10:15–11:30 a.m.
CONCURRENT SESSIONS

Campus-Community Partnerships: Serving the Local Area
Regency Ballroom 3

Developing Digital Competencies Embedded in a Liberal Arts Curriculum
Atlantic Ballroom 1

Making Big Strategic Bets That Provide a Competitive Advantage
Atlantic Ballroom 3

The Financial and Strategic Outlook for Private Colleges
Regency Ballroom 2

Understanding the Public’s Issues with Higher Education
Regency Ballroom 1

11:45 a.m.–1:00 p.m.
CONCURRENT SESSIONS
(with boxed lunch)

Articulating an Institutional Vision for Fundraising Campaigns
Atlantic Ballroom 3

Contractual Considerations to Protect Presidents in Times of Crisis
Regency Ballroom 1

Financial Resilience: Examples of Innovation and Successful Management
Regency Ballroom 3

Immigration Update
Regency Ballroom 2

Intercollegiate Athletics: Strengthening Enrollment and Retention
Atlantic Ballroom 2

The President’s Perspective on Board Relations
(Open only to currently serving college and university presidents)
Atlantic Ballroom 1

1:00–2:00 p.m.
ASSOCIATED MEETINGS

Executive Officers of CIC State Council Members
Room 320
2018 Presidents Institute

National Association of Schools and Colleges of the United Methodist Church
Room 317

U.S.-Mexico Higher Education Summit Participants
Room 307

Women’s College Coalition Board of Directors’ Luncheon
Room 319

1:30–5:00 p.m.
Optional Excursion: Everglades Tour
Meet in the hotel lobby.

2:00–3:30 p.m.
WORKSHOPS
(Pre-registration required)

 Foundation Philanthropy: An Insider’s View into Securing Grants
Atlantic Ballroom 3

Strategic Planning: Beyond Smoke and Mirrors
Atlantic Ballroom 1

4:00–5:00 p.m.
ASSOCIATED MEETINGS

 Association of Adventist Colleges and Universities
Room 317

 Distinctive Programs Group
(By invitation only)
Room 318

 Network for Vocation in Undergraduate Education (NetVUE) Reception
Room 303

5:00–6:30 p.m.
ALL-INSTITUTE RECEPTION
Grand Ballroom Foyer and Terrace

6:30 p.m.
Dinner on Your Own

6:30 p.m.
ASSOCIATED MEETINGS

 Association of Adventist Colleges and Universities Dinner
Room 317

 Women’s College Coalition Dinner
Room 319

Saturday, January 6

7:00 a.m.–5:00 p.m.
Institute Registration
Grand Ballroom Foyer

7:15–8:15 a.m.
BREAKFAST ROUNDTABLE DISCUSSIONS

• Breakaway Learners: Strategies for Success with At-Risk Students
• Considerations for Establishing a General Counsel
• Developing Vocational Exploration on Campus
• Finding Interim Candidates for Senior Leadership Positions
• Postsecondary Success: Leveraging Consumer Insights for Results
• Preparing a New Generation for Leadership on the Global Stage

7:15–8:15 a.m.
BREAKFAST MEETINGS

 Presidents of Historically Black Colleges and Universities
Room 320

 Presidents of International Colleges and Universities
Room 319

 Presidents of Very Small Colleges and Universities (Under 600 FTE)
Room 316

 Presidential Vocation and Institutional Mission Program Past Participants
Rooms 312 and 313

 Project Pericles Presidents
Room 315

7:15–8:15 a.m.
BREAKFAST ROUNDTABLE DISCUSSIONS
(See pages 40–41 for listings.)
Grand Ballroom West

2:00–4:00 p.m.
PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM
Networking Discussion Session
(See page 35 for listing.)
Rooms 312 and 313

3:00–5:00 p.m.
CIC State Councils Advisory Committee Meeting
Room 316

3:30–4:45 p.m.
Open Dialogue on Managing Risk to Safeguard Mission
Regency Ballroom 1

8:15–9:15 a.m.
CIC State Councils Advisory Committee Meeting
Room 316

8:30 a.m.
Breakfast Roundtable Discussions
(See pages 40–41 for listings.)
Grand Ballroom West
8:00 a.m.–5:00 p.m.
INDIVIDUAL CONSULTATIONS
(See page 20 for listings.)

8:30–9:45 a.m.
PLENARY SESSION

“Innovation and ‘Intrepreneurship’ for Independent Higher Education”
Michael D. Rhodin

Great Hall

10:15–11:30 a.m.
CONCURRENT SESSIONS

Building International Partnerships for Student Exchanges and Study Abroad
Atlantic Ballroom 2

Effective Strategies for Addressing Financial Challenges
Atlantic Ballroom 3

Innovative Collaborations and Partnerships
Regency Ballroom 1

Understanding the Next Generation of Students
Atlantic Ballroom 1

What’s New in Title IX: A President’s Guide to Ensuring Compliance and Avoiding Pitfalls
Regency Ballroom 2

10:15–11:30 a.m.

PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM
CONCURRENT SESSION

Serving on Boards
Rooms 312 and 313

11:45 a.m.–1:00 p.m.

CONCURRENT SESSIONS
(with boxed lunch)

Academic Prioritization: The President’s Role in Leading Curricular Change
Regency Ballroom 2

Creative Approaches to Foster Flourishing Language Programs
Atlantic Ballroom 1

Legal Issues That Keep Presidents Up at Night
Regency Ballroom 3

Lessons for Presidential Practice from Recent Research
Atlantic Ballroom 2

Presidential Considerations for College Mergers and Acquisitions
Atlantic Ballroom 3

Presidents “Open Mike”
(Open only to currently serving college and university presidents)
Regency Ballroom 1

11:45 a.m.–1:00 p.m.

PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM
CONCURRENT SESSIONS

The Presidential Spouse or Partner Contract
Grand Ballroom West

1:00–2:00 p.m.

MEETINGS OF CIC STATE COUNCIL MEMBER ORGANIZATIONS

Associated Colleges of Illinois
Room 318

Independent Colleges of Indiana
Room 316

North Carolina Independent Colleges and Universities
Room 314

Ohio Foundation of Independent Colleges
Room 319

Wisconsin Association of Independent Colleges and Universities
Room 320

1:00–2:00 p.m.

NetVUE Focus Group
(By invitation only)
Room 317

1:30–3:30 p.m.

PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM
Networking and Discussion Sessions
Rooms 312 and 313

1:30–5:00 p.m.

Optional Excursion: Wynwood: A History of Street Art
Meet in the hotel lobby.
Sunday, January 7

7:00–11:30 a.m.
Institute Registration
Grand Ballroom Foyer

7:00–7:30 a.m.
Ecumenical Worship Service
Atlantic Ballroom 1

Monday, January 8

8:00 a.m.–5:00 p.m.
Associated Colleges of the South
Rooms 301 and 302

Tuesday, January 9

8:00 a.m.–3:00 p.m.
Associated Colleges of the South
Rooms 301 and 302
Tuesday, January 2

6:00–8:00 p.m.  
Thrivent Fellows Group  
*Rooms 216 and 217*  
Convener: **Thomas E. Cedel**, President Emeritus, Concordia University Texas

Wednesday, January 3

7:30–11:30 a.m.  
Registration for New Presidents Program and Presidents Governance Academy Participants  
*Grand Ballroom Foyer*  
*Please note: Pre-registration is required for these programs. Inquire at the CIC Registration Desk.*

7:30 a.m.–5:00 p.m.  
Thrivent Fellows Group  
*Room 217*  
Convener: **Thomas E. Cedel**, President Emeritus, Concordia University Texas

8:00 a.m.–8:30 p.m.  
New Presidents Program (including spouses and partners of new presidents)  
*See pages 9–13 for meeting rooms.*

8:00 a.m.–8:30 p.m.  
Presidents Governance Academy  
*See pages 14–17 for meeting rooms.*

Noon–8:00 p.m.  
Lutheran Educational Conference of North America  
*Rooms 212–214*  
Convener: **Tom Ries**, President, Concordia University, St. Paul
New Presidents Program

INCLUDING SPOUSES AND PARTNERS OF NEW PRESIDENTS

Sponsored by Ellucian

Please note: Pre-registration is required for this program. Inquire at the CIC Registration Desk.

WEDNESDAY, JANUARY 3

8:00–8:45 a.m. Breakfast for New Presidents and Spouses and Partners
Regency Ballroom 1

SESSIONS FOR NEW PRESIDENTS

9:00–9:15 a.m. Welcoming Remarks
Regency Ballroom 2
Mary Pat Seurkamp, Senior Advisor and Director, CIC New Presidents Program, and President Emerita, Notre Dame of Maryland University

9:15–10:15 a.m. Making Connections
Regency Ballroom 2
L. Jay Lemons, President Emeritus, Susquehanna University, and President, Academic Search, Inc.

10:15–10:30 a.m. Refreshment Break
Regency Ballroom Foyer

10:30–11:30 a.m. The Changed Environment for Presidential Leadership: Innovation and Beyond
Regency Ballroom 1
Paul Hennigan, President, Point Park University
Mary B. Marcy, President, Dominican University of California

11:30 a.m.–12:15 p.m. I Wish I Had Known What I Know Now
Regency Ballroom 1
Colette Pierce Burnette, President, Huston-Tillotson University
Thomas J. Minar, President, Franklin College (IN)
# Pathways to Excellence

## SESSIONS FOR SPOUSES AND PARTNERS OF NEW PRESIDENTS

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
<th>Facilitators</th>
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<tbody>
<tr>
<td>9:00–9:15 a.m.</td>
<td><strong>Welcoming Remarks</strong></td>
<td><em>Regency Ballroom 3</em></td>
<td>Katherine M. Whatley, Senior Vice President, CIC</td>
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<td>Lynne C. Joyce, Presidential Spouse, Brevard College</td>
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<td>J. Lawrence Smith, Presidential Spouse, York College of Pennsylvania</td>
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<tr>
<td>9:15–10:15 a.m.</td>
<td><strong>Making Connections</strong></td>
<td><em>Regency Ballroom 3</em></td>
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<tr>
<td>10:15–10:30 a.m.</td>
<td><strong>Refreshment Break</strong></td>
<td><em>Regency Ballroom Foyer</em></td>
<td></td>
</tr>
<tr>
<td>10:30–11:45 a.m.</td>
<td><strong>Transitioning into the Presidential Spouse or Partner Role</strong></td>
<td><em>Regency Ballroom 3</em></td>
<td></td>
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<tr>
<td>11:45 a.m.–12:15 p.m.</td>
<td><strong>Higher Ed 101</strong></td>
<td><em>Regency Ballroom 3</em></td>
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</tbody>
</table>

### LUNCHEON FOR NEW PRESIDENTS AND SPOUSES AND PARTNERS

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
<th>Welcome: Carol A. Leary, President, Bay Path University, and Chair, CIC New Presidents Program Advisory Committee</th>
</tr>
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<tbody>
<tr>
<td>12:30–1:45 p.m.</td>
<td><strong>Luncheon</strong></td>
<td><em>Regency Ballroom 2</em></td>
<td>Remarks: Elizabeth L. Paul, President, Capital University</td>
</tr>
</tbody>
</table>
**SESSIONS FOR NEW PRESIDENTS**

2:00–3:15 p.m.  
**Financial Fundamentals and Strategies for the New President**  
*Regency Ballroom 1*  
Roger D. Drake, President, Central Methodist University

3:15–3:30 p.m.  
**Refreshment Break**  
*Regency Ballroom Foyer*

3:30–4:30 p.m.  
**Enrollment, Marketing, and Today’s Students: Getting Them and Keeping Them**  
*Regency Ballroom 1*  
Mary Dana Hinton, President, College of Saint Benedict  
Gerard J. Rooney, President, St. John Fisher College

4:30–5:00 p.m.  
**Open Mike—Questions and Comments**  
*Regency Ballroom 1*  
Mary Pat Seurkamp

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**SESSIONS FOR SPOUSES AND PARTNERS OF NEW PRESIDENTS**

2:00–3:15 p.m.  
**Getting Off to a Great Start**  
*Regency Ballroom 3*  
Lynne C. Joyce and J. Lawrence Smith

3:15–3:30 p.m.  
**Refreshment Break**  
*Regency Ballroom Foyer*

3:30–4:30 p.m.  
**Building Trust**  
*Regency Ballroom 3*

4:30–5:00 p.m.  
**Open Mike—Questions and Comments**  
*Regency Ballroom 3*
6:30–7:00 p.m.  
RECEPTION FOR NEW PRESIDENTS AND SPOUSES AND PARTNERS  
Regency Ballroom and Atlantic Ballroom Foyers

7:00–8:30 p.m.  
DINNER FOR NEW PRESIDENTS AND SPOUSES AND PARTNERS  
Regency Ballroom 2  
Hosts: Logan C. Hampton, President, Lane College, and Lynne C. Joyce, Presidential Spouse, Brevard College  
Remarks: Richard Ekman, President, CIC

THURSDAY, JANUARY 4

SESSIONS FOR NEW PRESIDENTS

7:15–8:00 a.m.  
Breakfast  
Regency Ballroom 2

8:15–9:00 a.m.  
Dancing with Those You Inherited—Building the Senior Team  
Regency Ballroom 1  
Mary-Beth Cooper, President, Springfield College  
Arvid C. Johnson, President, University of St. Francis (IL)

9:00–10:45 a.m.  
Working with the Board—Basics and Beyond  
Regency Ballroom 1  
Thomas F. Flynn, President, Alvernia University  
Wendy B. Libby, President, Stetson University  
Moderator: Douglas M. Orr, President Emeritus, Warren Wilson College

SESSIONS FOR SPOUSES AND PARTNERS OF NEW PRESIDENTS

7:15–8:00 a.m.  
Breakfast  
Regency Ballroom 3

8:15–9:15 a.m.  
Building Resiliency  
Regency Ballroom 3  
Lynne C. Joyce and J. Lawrence Smith
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
<th>Speaker(s)</th>
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<tbody>
<tr>
<td>9:15–10:45 a.m.</td>
<td>Making the Role Work For You</td>
<td>Regency Ballroom 3</td>
<td></td>
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<tr>
<td>10:45–11:00 a.m.</td>
<td>Refreshment Break</td>
<td>Regency Ballroom Foyer</td>
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<tr>
<td>11:00 a.m.–12:15 p.m.</td>
<td>The President and Institutional Advancement</td>
<td>Regency Ballroom 1</td>
<td>Joanne Berger-Sweeney, President, Trinity College (CT)</td>
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<td>David C. Joyce, President, Brevard College</td>
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<td>J. Lawrence Smith, Presidential Spouse, York College of Pennsylvania</td>
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<tr>
<td>12:30–2:00 p.m.</td>
<td>Luncheon—You Got the Job, Now What?</td>
<td>Regency Ballroom 2</td>
<td>L. Jay Lemons</td>
</tr>
<tr>
<td>2:15–3:15 p.m.</td>
<td>Questions, Closing Remarks, and Initial Evaluation</td>
<td>Regency Ballroom 1</td>
<td>Mary Pat Seurkamp</td>
</tr>
<tr>
<td>2:15–3:15 p.m.</td>
<td>Taking Charge of Your Role: Questions and Closing Remarks</td>
<td>Regency Ballroom 3</td>
<td>Lynne C. Joyce and J. Lawrence Smith</td>
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</tbody>
</table>
Presidents Governance Academy

Supported by the Henry Luce Foundation

Please note: Pre-registration is required for this program. Inquire at the CIC Registration Desk.

WEDNESDAY, JANUARY 3

8:00–8:45 a.m.  Breakfast

Room 301

9:00–9:45 a.m.  Welcome and Introductions

Room 303

• Review of participant survey

• What are some of the most vexing challenges presidents face in working with their boards of trustees?

Facilitators:

Richard T. (Tom) Ingram, Senior Advisor for President-Board Relations, CIC, and former President, Association of Governing Boards of Universities and Colleges

Richard J. Cook, President Emeritus, Allegheny College

9:45–10:30 a.m.  Discussion Topics

Room 303

• Review of key program themes, facilitator roles, ground rules, and agenda

• What distinguishes a high-performing governing board?

10:30–10:45 a.m.  Refreshment Break

Room 303
10:45–11:45 a.m. **Discussion Topics**

*Room 303*

- What levers, strategies, and resources are available to presidents to strengthen the board?
- What presidential relationships are particularly key—and sometimes problematic?
- “Shared” governance and relations with the faculty

Noon–1:00 p.m. **Lunch**

*Room 301*

1:15–2:45 p.m. **Discussion of Best Board Practices (Part 1)**

*Room 303*

- Membership: size, composition, terms and term limits, committee on trustees
- Organization: committees, especially executive, and reserved powers
- Meetings
- Trustee philanthropy

2:45–3:00 p.m. **Refreshment Break**

*Room 303*

3:00–4:30 p.m. **Discussion of Best Board Practices (Part 2)**

*Room 303*

- Retreats
- Orientation programs
- In-service education
- Handbook and trustee information systems

4:30–5:00 p.m. **Bylaws Discussion**

*Room 303*

- Overview of facilitator critiques of participants’ bylaws
6:30–7:00 p.m.  
**Reception**  
*Room 302 and Terrace*

7:00–8:30 p.m.  
**Dinner**  
*Room 301*

**THURSDAY, JANUARY 4**

7:15–8:00 a.m.  
**Breakfast**  
*Room 301*

8:00–8:45 a.m.  
**Reflections**  
*Room 303*  
- On yesterday’s conversations
- On a few articles in the Book of Readings you find especially helpful or provocative

8:45–10:15 a.m.  
**Discussion Topics**  
*Room 303*  
- How does affiliation with your respective sponsor, founder, congregation, tradition, or other major influence directly affect, positively or negatively, how your governing board is constituted, is organized, or functions?
- What are best practices in performance assessment of the governing board, individual trustees, and the presidency?

10:15–10:30 a.m.  
**Refreshment Break**  
*Room 303*

10:30–11:30 a.m.  
**One-on-One Bylaws Critique (In Teams of Two)**  
*Rooms 302 and 303*
11:30 a.m.–12:15 p.m.

Review of Bylaws Discussions

Room 303

12:15–2:00 p.m.

Lunch and Discussion

Room 301

• What are some effective approaches to in-service trustee education and board development initiatives that have worked for you? Which approaches have not worked?

• What is your plan to strengthen governance policies and practices (explicit goals, strategy, and timetable)?

• Closing comments by facilitators and program assessment
THURSDAY, JANUARY 4

7:45–8:45 a.m.  Executive Committee Breakfast Meeting
Room 321

8:00–8:45 a.m.  Board of Directors Breakfast
Rooms 312 and 313

8:45–10:00 a.m.  BOARD OF DIRECTORS COMMITTEE MEETINGS
Room 318  Awards Committee
Room 319  Investment Committee
Room 320  Orientation of New Board Members

10:15–11:30 a.m.  BOARD OF DIRECTORS COMMITTEE MEETINGS
Room 318  Membership Committee
Room 320  Programs Committee
Room 317  Public Information Committee
Room 319  Resource Development Committee

11:30 a.m.–12:30 p.m.  Board of Directors Luncheon
Rooms 312 and 313

12:30–3:00 p.m.  BOARD OF DIRECTORS MEETING
Room 307
Thursday, January 4

7:00 a.m.–5:00 p.m.  
*Institute Registration*  
*Grand Ballroom Foyer*  
Sign up for Individual Consultations and other events with space limitations.

7:15 a.m.–3:15 p.m.  
*New Presidents Program (including spouses and partners of new presidents)*  
See pages 9–13 for meeting rooms.

7:15 a.m.–2:00 p.m.  
*Presidents Governance Academy*  
See pages 14–17 for meeting rooms.

7:45 a.m.–3:00 p.m.  
*CIC Board of Directors Meeting*  
See page 18 for meeting rooms.

8:00 a.m.–3:00 p.m.  
*Lutheran Educational Conference of North America*  
*Rooms 212–214*  
Convener: Tom Ries, President, Concordia University, St. Paul

8:00 a.m.–3:00 p.m.  
*Thrivent Fellows Group*  
*Room 217*  
Convener: Thomas E. Cedel, President Emeritus, Concordia University Texas

Noon–4:00 p.m.  
*Lower Cost Models for Independent Colleges*  
(By invitation only)  
Room 317  
Convener: Michael B. Alexander, President, Lasell College
INDIVIDUAL CONSULTATIONS

Presidents have opportunities to schedule individual appointments with selected experts. Individual consultants’ schedules may vary. Please sign up in advance at the CIC Registration Desk.

Board Relations

Room 201
Richard T. (Tom) Ingram, Senior Advisor for President-Board Relations, CIC, and former President, Association of Governing Boards of Universities and Colleges

Room 208
Douglas M. Orr, President Emeritus, Warren Wilson College

CIC Key Indicators Tool and Financial Indicators Tool Benchmarking Reports

Room 203
Michael Williams, President, The Austen Group, a Division of Ruffalo
Noel Levitz

Endowment Management Best Practices

Room 204
Michael V. Collins, Senior Director, Endowments and Foundations, TIAA

Financial and Retirement Planning for Presidents, Spouses, and Partners

Room 205
TIAA Wealth Management Advisor

Leadership Issues

Room 206
Susan Resneck Pierce, President Emerita, University of Puget Sound

Presidential Compensation and Benefits

Room 207
Frank A. Casagrande, President, Casagrande Consulting, LLC

Room 202
Alexander C. Yaffe, President and CEO, Yaffe & Company, Inc.

Presidential Contracts

Room 209
Raymond D. Cotton, Partner, Nelson Mullins Riley & Scarborough LLP
2:30–4:30 p.m.  
**American Baptist Association of Colleges and Universities**

Conveners: **James T. (Tim) Barry**, President, Alderson Broaddus University, and **Marilyn P. Turner-Triplett**, Associate Executive Director for Missional Life and Leadership, American Baptist Home Mission Societies

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3:30–4:15 p.m.  
**Presidents Institute Spouses and Partners Task Force Meeting**

Conveners: **Betty Neal Crutcher**, Co-Chair, and Presidential Spouse, University of Richmond, and **Mary L. Trettin**, Co-Chair, and Presidential Spouse, Northland College

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**PRESIDENTS INSTITUTE BEGINS**

5:00–6:15 p.m.  
**WELCOME AND INSTITUTE OVERVIEW**

*Great Hall*

- **Thomas L. Hellie**, Chair, CIC Board of Directors, and President, Linfield College
- **Richard Ekman**, President, CIC
- **Betty Neal Crutcher**, Co-Chair, Presidents Institute Spouses and Partners Task Force, and Presidential Spouse, University of Richmond
- **Mary L. Trettin**, Co-Chair, Presidents Institute Spouses and Partners Task Force, and Presidential Spouse, Northland College

**KEYNOTE ADDRESS**

“What’s at Stake for Independent Colleges in Our Turbulent World?”

*(Sponsored by Jenzabar)*

Independent colleges and universities have a legacy of adapting to new environments, of responding to changes in market conditions, and of being agile leaders in the midst of social and economic challenges. In today’s turbulent world with rapid political, social, economic, and technological changes, what role should independent colleges and universities play? What is at stake for these storied institutions with their rich histories and long-standing commitment to serve the needs of the nation? What is required of private college presidents to be leaders—rather than merely
reactors—in these unsettled times? An acclaimed political and economic commentator, David Leonhardt of the *New York Times*, will lead off the 2018 Presidents Institute with his insights and challenges for presidents as they consider how best to guide their institutions in this volatile period.

David Leonhardt is an op-ed columnist for the *New York Times* where he was founding editor of “The Upshot,” a website covering politics and policy. He previously was the Times’s Washington bureau chief and a staff writer for the *New York Times Magazine*. Leonhardt recently led a strategic review of the Times newsroom to help leadership plan the future of the organization, resulting in the “2020 report” that was released publicly in January 2017. Before joining the Times, Leonhardt worked for *Business Week* and the *Washington Post*. In 2011, he received the Pulitzer Prize for his columns on the financial crisis and its aftermath. He is the author of the best-selling e-book, *Here’s the Deal: How Washington Can Solve the Deficit and Spur Growth* (2013). Since 2011, he has served on the jury for the Aspen Prize for Community College Excellence. He also serves on the board of the American Academy of Political and Social Science. Leonhardt holds a bachelor’s degree in applied mathematics from Yale University.

Chair: Pamela J. Gunter-Smith, President, York College of Pennsylvania

6:30–8:30 p.m.  
**WELCOMING DINNER**  
*Grand Ballroom*  
(Sponsored by Capture Higher Ed and Johnson, Grossnickle and Associates)

Following the keynote address, a combination reception and buffet dinner for all registered Institute participants will provide an inviting setting to greet old friends and meet new ones.

*Please note: Dinner tickets for adult guests and unregistered spouses and partners may be purchased at the CIC Registration Desk.*

8:00–8:45 p.m.  
**Reception for Sponsors**  
*Atlantic Ballroom 1*

All sponsors of the Presidents Institute are welcome.

Host: CIC Board of Directors
Friday, January 5

7:00 a.m.–5:00 p.m.  
**Institute Registration**

*Grand Ballroom Foyer*

Sign up for Individual Consultations and other events with space limitations.

7:15–8:15 a.m.  
**Breakfast**

*Grand Ballroom East*  
*(Sponsored by Hastings+Chivetta Architects, Inc.)*

Breakfast is provided for all registered Institute participants. Several Roundtables are designated for participants who wish to join colleagues to discuss specific topics.

**BREAKFAST ROUNDTABLE DISCUSSIONS**

**Battling Climate Change**

Despite declining federal support of climate change initiatives, many colleges and universities are forging ahead with their own environmental commitments. Learn about expanded and diversified strategies endorsed by the Climate Leadership Network, with a membership of more than 600 colleges and universities. Discuss with colleagues ways to address climate change both locally and globally through direct campus action and in the curriculum.

*Richard J. Cook*, past Chair, Board of Directors, Second Nature, and President Emeritus, Allegheny College

*Wim Wiewel*, President, Lewis & Clark College

**Developing Interfaith Cooperation on Campus**

An increasing number of colleges and universities are considering how to respond to the expanding religious diversity on campus and the continuing prominence of religious tensions in American politics and global affairs. The conveners will share practical strategies for connecting interfaith cooperation with the college’s mission and will describe efforts to integrate interfaith understanding into the curriculum. Presidents who are new to or experienced in interfaith initiatives are invited to participate in the discussion.

*Devorah Lieberman*, President, University of La Verne

*Eboo Patel*, Founder and President, Interfaith Youth Core

*Laurie Patton*, President, Middlebury College
Insights From Early FAFSA for College Recruitment Strategy

Institutions that are adapting their recruitment strategies in response to the Early FAFSA are seeing a decisive competitive advantage. Learn from new research on the influence of an accelerated financial aid calendar and share with colleagues lessons learned from adjusting to the Early FAFSA.

Chris Marett, President, Enrollment Services, EAB

Making Research Actionable for Presidents

CIC’s Digest of Recent Research highlights timely research from scholarly journals and other publications with a focus on findings relevant to presidents and other leaders of independent colleges and universities. The new editor of the Digest invites presidents to share which issues and topics are of greatest interest to them. What gaps exist in the research literature, and how can findings be more readily translated into action for presidents and other leaders of independent colleges?

Matthew J. Mayhew, William Ray and Marie Adamson Flesher Professor of Educational Administration, Ohio State University, and Editor, Digest of Recent Research, CIC

Using Donor-Advised Funds to Close the Fundraising Gap

Did you know that donor-advised funds outnumber private foundations by a ratio of three-to-one? Higher education receives a large share of donor-advised gifts. Some colleges and universities have established their own donor-advised funds as a service for their supporters. Join the conversation to gain a better understanding of the differences between donor-advised funds and private foundations and how they can both be used to help your donors achieve their personal charitable goals while benefiting your institution’s fundraising efforts.

Kay T. McFarlin, President and CEO, TIAA Charitable

Yes We Must Coalition: College Success For All

Independent colleges strive to increase the degree attainment of students from low-income backgrounds. Discussions will examine how the Yes We Must Coalition is supporting independent institutions that enroll 50 percent or more Pell-eligible undergraduates to increase graduation rates and to advocate for low-income students and the institutions that serve them.
**Gloria Nemerowicz**, Founder and President, Yes We Must Coalition, and former President, Pine Manor College

7:15–8:15 a.m.

**BREAKFAST MEETINGS**

**Room 320**

**Association of Catholic Colleges and Universities**

Convener: **Michael Galligan-Stierle**, President

**Rooms 312 and 313**

**Council For Christian Colleges & Universities**

Convener: **Charles W. Pollard**, President, John Brown University, and Board Chair, Council for Christian Colleges & Universities

**Room 314**

**National Association of Intercollegiate Athletics**

Conveners: **Jim Carr**, President, NAIA, and **Kent L. Henning**, President, Grand View University

**Room 316**

**Nonmember Presidents and Member Presidents Participating in the Institute for the First Time**

Convener: **Thomas L. Hellie**, President, Linfield College, and Chair, CIC Board of Directors

8:00 a.m.–5:00 p.m.

**INDIVIDUAL CONSULTATIONS**

Presidents have opportunities to schedule individual appointments with selected experts. Individual consultants’ schedules may vary. See page 20 for the full list of consultants. Please sign up in advance at the CIC Registration Desk.

8:30–9:45 a.m.

**PLENARY SESSION**

**Great Hall**

“Preparing Students For Civic Responsibility”

(Sponsored by National Research Center for College and University Admissions)

Independent colleges and universities play an important role in educating the next generation of responsible and engaged citizens of our democracy. The 2016 U.S. presidential election raised important questions about
how thoroughly prepared Americans are to exercise their citizenship and to discern from among competing claims and political propaganda. Widely divergent views between the educated “elite” and the working class were exposed. How can college presidents position their campuses as centers for learning from and interacting with diverse populations, engaging in civil discourse and debate, and educating lifelong learners? How can presidents lead their institutions to prepare graduates who are committed to justice and equality, free expression, and a relentless pursuit of evidence-based truth? The longest-serving senior advisor to President Obama, Valerie B. Jarrett, will discuss the role independent colleges and universities can play in renewing the nation’s commitment to a robust democracy devoted to civil discourse and inclusive democratic engagement.

Valerie B. Jarrett has had a distinguished career as a civic leader, business executive, and attorney. She served as senior advisor to the President of the United States during the eight years of the Obama administration where she oversaw the Office of Public Engagement and Intergovernmental Affairs and chaired the White House Council on Women and Girls. Before that, she was co-chair of the Obama-Biden transition team. Jarrett began her career in politics in Chicago as deputy corporation counsel for finance and development in the administration of Mayor Harold Washington. She subsequently was deputy chief of staff for Mayor Richard M. Daley and later served as commissioner of the Department of Planning and Development and chaired the Chicago Transit Board. Jarrett also was chief executive officer of the Habitat Company, a Chicago real estate development and management firm. She has served as chair of the board of trustees of the University of Chicago Medical Centers, vice chair of the board of trustees of the University of Chicago, and as a trustee of Chicago’s Museum of Science and Industry. She also chaired the board of the Chicago Stock Exchange and was a director of the Federal Reserve Bank of Chicago. Jarrett earned a BA in psychology from Stanford University and a JD from the University of Michigan Law School.

Moderator: Carl J. Strikwerda has served as president of Elizabethtown College since 2011. He previously served as dean of the faculty of arts and sciences at the College of William and Mary and associate dean of liberal arts and sciences at the University of Kansas. Earlier, he taught history at the State University of New York at Purchase and at the University of California at Riverside. He is the co-editor of Deans and Development: Making the Case for Supporting the Liberal Arts and Sciences (2014). Strikwerda earned a BA from Calvin College, an MA in history from the University of Chicago, and a PhD in history from the University of Michigan.

Chair: Donna M. Carroll, President, Dominican University (IL)
9:45–10:15 a.m. **Refreshment Break**  
*Grand Ballroom Foyer*  
(Sponsored by Aramark)

10:15–11:30 a.m. **CONCURRENT SESSIONS**  
(Sponsored by Educational & Institutional Insurance Administrators, Inc.)

**Regency Ballroom 3**

**Campus-Community Partnerships: Serving the Local Area**

How can distinctive economic ventures bolster town-and-gown relationships? In what ways can these local partnerships provide unique educational opportunities that benefit students and the community? Presidents who have engaged with their local communities and developed innovative projects—including a wine studies program, a center for craft food and beverage, and community service initiatives—will discuss their approaches and what they have learned as a result.

**Mauri A. Ditzler**, President, Albion College  
**Margaret L. Drugovich**, President, Hartwick College  
**Thomas L. Hellie**, President, Linfield College  
Chair: **Jorge G. Gonzalez**, President, Kalamazoo College

**Atlantic Ballroom 1**

**Developing Digital Competencies Embedded in a Liberal Arts Curriculum**

A decade after the introduction of the first iPhone, the recognition in the labor market of the utility of digital competencies, such as coding and app development, is still growing. This interactive session will explore several themes: What are the distinct advantages of acquiring such skills embedded in a liberal arts curriculum? How can independent colleges and universities take advantage of the increasing student demand while remaining true to their mission and pedagogical priorities? How can app development and coding training build digital literacy in students and also equip them to ask critical questions of technology? How can these programs create opportunities for cross-disciplinary collaboration on campus and new forms of community outreach?

**Andrew Currah**, Education Development Executive, Apple Inc.  
**Mark Lombardi**, President, Maryville University of Saint Louis  
Chair: **Mary Ann Gawelek**, President, Lourdes University
Making Big Strategic Bets That Provide a Competitive Advantage

Making big changes with limited resources often requires placing strategic “big bets.” Two college presidents and an expert in market-informed decision making will discuss approaches to transformative institutional change that creates competitive advantage while remaining true to the mission of the institution. Moreover, the presenters also will explain how they have used robust planning and market research to develop academic, student life, and other strategic initiatives. Other discussion topics include the need to innovate from a position of strength and to keep institutional strategy at the forefront during periods of prolonged uncertainty.

Helen G. Drinan, President, Simmons College

David W. Strauss, Principal, Art & Science Group

Adam Weinberg, President, Denison University

Chair: Chris Howard, President, Robert Morris University

The Financial and Strategic Outlook for Private Colleges

How do financial analysts view the future of independent colleges and universities? Pressures persist to reduce costs, develop alternative sources of revenue, eliminate under-enrolled programs, and consider new business models. How can a college president navigate the institution through this period of change? An industry expert will review the financial outlook for private colleges and universities in 2018 and outline issues expected to be prominent for higher education management in the near future.

Susan I. Fitzgerald, Associate Managing Director, Global Higher Education and Not for Profit Ratings, Moody’s Investors Service

Chair: J. Bradley Creed, President, Campbell University

Understanding the Public’s Issues with Higher Education

Journalists will offer perspectives on recent studies that report negative attitudes toward higher education among segments of the public. How do they approach reporting on the public’s views? What advice do they have for college presidents to assure their perspectives are heard?

Sarah Hardesty Bray, Opinion Editor, Inside Higher Ed

Steve Kolowich, Senior Reporter, Chronicle of Higher Education
10:15 a.m.–1:00 p.m.

**PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM**

**WELCOME, ADDRESS, AND LUNCHEON**

“Understanding the Next Generation of College Students”

*(Sponsored by TIAA)*

The demographic characteristics of college students are changing. How is the current group of students different from—and similar to—the students on campus five years ago? What changes should be made to campus attitudes, processes, and facilities to accommodate new student expectations? How can colleges and universities help entering students adapt and thrive in their new communities? What role can presidential spouses and partners play in helping students feel welcome and a part of campus?

Kevin Kruger has served as president of NASPA—Student Affairs Administrators in Higher Education since 2012. He joined NASPA as associate executive director in 1994. He has pursued initiatives to enhance NASPA’s role in public policy, research, professional development, and student learning and assessment, with a focus on the use of technology to serve diverse student populations.

Prior to his service at NASPA, Kruger worked for 15 years at the University of Maryland College Park and the University of Maryland Baltimore County in orientation, student activities, leadership development, admissions, and student affairs. He also has served as an adjunct faculty member in the student development in higher education program at Trinity Washington University. Kruger is the editor of two Jossey-Bass publications: *Technology Innovations in Student Services and Using Technology to Promote Student Learning*. He also wrote chapters in *The Handbook of Student Affairs Administration; Understanding the Role of Academic and Student Affairs Collaboration in Creating a Successful Learning Environment; Beyond Borders: How International Developments Are Changing Student Affairs Practice; and Involving Commuter Students in Learning*. Kruger earned a bachelor’s degree in history and political science from the University at Albany, SUNY, and a PhD in counseling and personnel services from the University of Maryland, College Park.
Co-Chairs: Betty Neal Crutcher, Co-Chair, Presidents Institute Spouses and Partners Task Force, and Presidential Spouse, University of Richmond and Mary L. Trettin, Co-Chair, Presidents Institute Spouses and Partners Task Force, and Presidential Spouse, Northland College

11:30–11:45 a.m.

**Refreshment Break and Boxed Lunches**

*Grand Ballroom Foyer*  
*(Sponsored by Vcamp360)*

Boxed lunches are available for registered Institute participants. Please pick up a boxed lunch and proceed to one of the concurrent sessions.

11:45 a.m.–1:00 p.m.

**CONCURRENT SESSIONS**

*Atlantic Ballroom 3*  
*(Sponsored by Credo)*

**Articulating an Institutional Vision for Fundraising Campaigns**

Presidential vision is key to securing transformative gifts for the institution. And crafting an institutional vision is an exercise in “translation.” How can a president engage others in creating a vision for the institution? How does talking about aspirational goals for the institution connect with and help a president develop a campaign strategy? Presenters will explore the articulation of vision and philanthropic fundraising through several case studies and offer a template for opportunities that are faithful and relevant to institutional vision and campaign goals.

Ted R. Grossnickle, Senior Consultant and Founder, Johnson, Grossnickle and Associates

Mary Dana Hinton, President, College of Saint Benedict

Paul C. Pribbenow, President, Augsburg University

Chair: Donald J. Farish, President, Roger Williams University

*Regency Ballroom 1*  

**Contractual Considerations to Protect Presidents in Times of Crisis**

Campus crises can arise from financial challenges, enrollment shortfalls, student and faculty misconduct, and other situations. These incidents can easily lead to friction between the board of trustees and the president and at times result in early departure of the president. Should a board decide to place blame on the president for the challenges facing the college, how can the president protect himself or herself? What contractual provisions
should be considered? A leading higher education attorney will discuss strategies for addressing these questions.

Raymond D. Cotton, Partner, Nelson Mullins Riley & Scarborough LLP

Chair: Elizabeth Davis, President, Furman University

Regency Ballroom 3

Financial Resilience: Examples of Innovation and Successful Management

A recent CIC research report highlights the extraordinary resilience of smaller private colleges and universities despite economic pressures, increased operating costs, and greater market competition. The data come from 14 years of benchmarking reports that are prepared for CIC members as CIC’s Key Indicators Tool (KiT) and Financial Indicators Tool (FiT). A co-author of the report will provide an overview of the findings, and two presidents will describe strategies employed at their institutions to defy the doomsday predictions of some pundits.

Bonnie L. Humphrey, President, Missouri Valley College

Henry W. Spaulding II, President, Mount Vernon Nazarene University

Michael Williams, President, The Austen Group, a Division of Ruffalo Noel Levitz

Chair: Susan D. Stuebner, President, Colby-Sawyer College

Regency Ballroom 2

Immigration Update

What is the current status of immigration laws affecting students and faculty and staff members? How do recent changes in DACA and other regulations, visa restrictions, and enforcement influence international recruitment? What approaches should private colleges and universities take to help international students feel safe and welcome? What is the president’s role in overseeing the implementation of the institution’s immigration strategy and procedures? An immigration attorney and a college president will lead a discussion of these issues.

Mark T. Cregan, CSC, Attorney, Law Office of Mark T. Cregan, PLLC, and former President, Stonehill College

Thomas A. Kazee, President, University of Evansville

Chair: Elizabeth J. Stroble, President, Webster University
Intercollegiate Athletics: Strengthening Enrollment and Retention

Intercollegiate athletics plays a critical role in the private college and university setting. What is the responsibility of the president in determining the strategic direction of athletics and overseeing its implementation? How can presidents be sure athletics is fully integrated into enrollment and retention efforts? How might a college determine which sports to target for expansion or elimination? How can presidents be sure athletics serves the mission of the institution? Presidents with experience in NCAA Division III or NAIA will lead the discussion.

Mary-Beth Cooper, President, Springfield College
Jeffrey R. Docking, President, Adrian College
Ed L. Schrader, President, Brenau University

Chair: Lester C. Newman, President, Jarvis Christian College

The President’s Perspective on Board Relations

(Open only to currently serving college and university presidents)

Presidents will have an opportunity to raise sensitive questions and issues about their work with the board. Discussion topics will arise from session participants and may include relations with the board chair, trustee recruitment, board development, committee structures and bylaws, and management of difficult situations.

Richard T. (Tom) Ingram, Senior Advisor for President-Board Relations, CIC, and former President, Association of Governing Boards of Universities and Colleges

Chair: Maryanne Stevens, RSM, President, College of Saint Mary

Refreshment Break

(Sponsored by Strada Education Network)

1:00–2:00 p.m.
Room 320

ASSOCIATED MEETINGS

Executive Officers of CIC State Council Members

Conveners: Carol M. Schuler, Vice President for State Council Programs, CIC, and A. Hope Williams, President, North Carolina Independent Colleges and Universities
Room 317

National Association of Schools and Colleges of the United Methodist Church

Convener: Amanda L. Allen, Director of Schools, Colleges, and Universities, General Board of Higher Education and Ministry

Room 307

U.S.-Mexico Higher Education Summit Participants

Conveners: Arturo Cherbowski Lask, Director, Santander Universidades and Universia (Mexico), Richard Ekman, President, CIC, and Rodrigo Guerra Botello, Secretary General, FIMPES (Mexico)

Room 319

Women’s College Coalition Board of Directors Luncheon

Convener: Michele Ozumba, President

1:30–5:00 p.m.

Optional Excursion: Everglades Tour

Meet in the hotel lobby.

Please note: Pre-registration is required. Inquire at the CIC Registration Desk.

2:00–3:30 p.m.

WORKSHOPS

Foundation Philanthropy: An Insider’s View into Securing Grants

(Sponsored by Collegis Education)

College and university presidents are better able to guide both academic affairs and development offices in making thoughtful approaches to foundations when they think about key strategic needs and opportunities well before a particular grant idea surfaces. What are the evolving philanthropic priorities of some of the leading foundations that support independent higher education? How do the grant-making strategies of foundations align with the critical issues facing private colleges and universities? What guidance can heads of foundations provide for developing proposals that meet the institution’s needs and fit the foundation’s guidelines? Presidents will have an opportunity to engage in candid conversation with leaders of several major foundations.
Atlantic Ballroom 1

**Strategic Planning: Beyond Smoke and Mirrors**

*(Sponsored by Strada Education Network)*

How can presidents work with others to develop relevant, realistic, and actionable strategic plans for their institutions? What approaches can be used to verify that progress is being made once the plan is adopted? What measures are needed to reassess and recalibrate the plan in light of external and internal environmental changes? This session will bring together critical elements of an effective strategic planning process focused on producing timely and measurable results, while ensuring all campus stakeholders rally around the institution’s core vision and mission.

The primary goals of this workshop are to:

- Explain how to engage institutional stakeholders to support the mission, vision, and strategic plan with energy, direction, and purposeful buy-in;
- Demonstrate how to produce a plan that is actionable, measurable, and credible in the eyes of the internal and external constituents of the institution;
- Provide practical tools, including worksheets, that demonstrate how to construct a set of dashboard indicators that are integrated with action plans and that create accountability for results across all levels of the institution; and
- Create opportunities for presidents to share examples of the challenges and successes they have experienced in strategic planning, including the critical importance of presidential leadership in the planning process.

**Ronald P. Mahurin,** Vice President for Strategy and Planning, Stamats

**Frederik Ohles,** President, Nebraska Wesleyan University

**Alan G. Walker,** President, Sierra Nevada College

Chair: **Christine Pharr,** President, Mount Mary University
2:00–4:00 p.m.  
**PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM**  
(Removed by TIAA)

**Networking and Discussion Session: What I Wish I Had Known from Day One**

Presidential spouses and partners are invited to gather for a lively discussion led by experienced spouses and partners who will pass on sage advice. Come meet new friends and greet longstanding ones. A brief informal reception with refreshments from 3:15 to 4:00 p.m. will conclude the session.

Facilitators:

*Jane Easter Bahls*, Presidential Spouse, Augustana College (IL)

*Patricia Lacey*, Presidential Spouse, Missouri Baptist University

3:00–5:00 p.m.

**CIC State Councils Advisory Committee Meeting**

Convener: *Carol M. Schuler*, Vice President for State Council Programs, CIC

3:30–4:45 p.m.

**Open Dialogue on Managing Risk to Safeguard Mission**

Engage in a discussion with industry experts and presidential colleagues about effective practices and lessons gathered from experience regarding enterprise risk management. Today’s dynamic higher education landscape is filled with complex internal and external risks. Leaders need fast, simple, and effective ways to detect, evaluate, prioritize, and understand the risks at hand so they can address the tough challenges that might jeopardize the institution’s continued success. The ability to mitigate risk systematically in keeping with the institution’s mission, strategic plan, governance practices, and fiscal capacity is the target for this session.

*Thomas J. Botzman*, President, Misericordia University

*Virginia M. (Gina) Wilson*, Senior Executive Vice President and Chief Financial Officer, TIAA
Friday

4:00–5:00 p.m.  
**ASSOCIATED MEETINGS**

*Room 317*

**Association of Adventist Colleges and Universities**

Convener: **Gordon Bietz**, Chief Executive Officer and retired President, Southern Adventist University

*Room 318*

**Distinctive Programs Group** *(By invitation only)*

Convener: **Mary B. Marcy**, President, Dominican University of California

*Room 303*

**Network for Vocation in Undergraduate Education (NetVUE) Reception**

Conveners: **David S. Cunningham**, Director of NetVUE, CIC, and **Harold V. Hartley III**, Senior Vice President, CIC

5:00–6:30 p.m.  
**ALL-INSTITUTE RECEPTION**

*Grand Ballroom Foyer and Terrace* *(Sponsored by TIAA in recognition of TIAA’s 100th anniversary)*

This is an opportunity—between afternoon workshops and excursions and dinner—to connect informally with colleagues. All Institute participants as well as family members and guests are welcome.

Remarks: **Ronald R. Pressman**, Chief Executive Officer, Institutional Financial Services, TIAA

6:30 p.m.  
**Dinner on Your Own**

This evening provides an opportunity for presidents, spouses and partners, speakers, and sponsors to join colleagues for dinner. Participants make their own arrangements.

6:30 p.m.  
**ASSOCIATED MEETINGS**

*Room 317*

**Association of Adventist Colleges and Universities Dinner**

Convener: **Gordon Bietz**, Chief Executive Officer and retired President, Southern Adventist University

*Room 319*

**Women’s College Coalition Dinner**

Convener: **Michele Ozumba**, President
Saturday, January 6

7:00 a.m.–5:00 p.m.

**Institute Registration**

Sign up for Individual Consultations and other events with space limitations.

7:15–8:15 a.m.

**Breakfast**

*(Sponsored by The Learning House, Inc.)*

Breakfast is provided for all registered Institute participants. Several Roundtables are designated for participants who wish to join colleagues to discuss specific topics.

**BREAKFAST ROUNDTABLE DISCUSSIONS**

**Breakaway Learners: Strategies for Success with At-Risk Students**

The discussion will focus on how to successfully serve “breakaway” students—first-generation, low-income students who are trying to break away from their past to secure a better future. The gap between low-income and high-income students persists, as efforts to close it have not met with great success. The author of a new book will discuss a new approach to addressing inequities by focusing on students who have succeeded despite struggling with the impacts of poverty and trauma.


**Considerations for Establishing a General Counsel**

What should presidents consider when determining whether to establish a general counsel position? How can presidents evaluate the needs for and potential benefits of in-house counsel? How can presidents ensure finding the right person who is a good fit for the institution? Having established such a position nine years ago, the presenters will discuss their initial expectations and how those have changed over time.

Darron Farha, Vice President, General Counsel, and Secretary to the Board of Directors, Valparaiso University

Mark A. Heckler, President, Valparaiso University
Developing Vocational Exploration on Campus

The Network for Vocation in Undergraduate Education (NetVUE) is a nationwide network of more than 210 colleges and universities administered by CIC with generous support from Lilly Endowment Inc. to foster the intellectual and theological exploration of vocation among college students. Learn about CIC’s network and discuss the benefits of participation in NetVUE programs and services.

David S. Cunningham, Director of NetVUE, CIC

Finding Interim Candidates for Senior Leadership Positions

The use of outside interim senior administrators has become more common as a foundation for the transformation of colleges and universities. The discussion will explore how presidents can use interims, not as placeholders but as agents of change responsible for the achievement of specific strategic objectives.

Bryan E. Carlson, President, Registry for College and University Presidents

Pamela R. Fox, President, Mary Baldwin University

Postsecondary Success: Leveraging Consumer Insights for Results

A new research platform, the Education Consumer Pulse (ECP), is expected to create the most extensive set of education consumer insights to date. Over the next three years, the ECP will provide regular insights from surveys of current, past, and prospective education consumers about some of the most pressing issues facing postsecondary education. Findings generated through a partnership with Gallup that illuminate pathways from college into the workforce will be discussed.

Paul A. De Giusti, Vice President, External and Government Affairs, Strada Education Network
Preparing a New Generation For Leadership on the Global Stage

The Millennium Campus Network (MCN) has helped prepare more than 5,500 undergraduate leaders from 300 colleges and universities for careers at the U.S. Department of State, USAID, and United Nations or to launch their own social entrepreneurial ventures. Discuss the important role independent colleges can play in preparing a new generation of ethical, effective, and engaged leaders for careers with global social impact.

Antoinette M. Hays, President, Regis College (MA)

Sam Vaghar, Executive Director, Millennium Campus Network

7:15–8:15 a.m.

**BREAKFAST MEETINGS**

*Room 320*

**Presidents of Historically Black Colleges and Universities**

Convener: Billy C. Hawkins, President, Talladega College

*Room 319*

**Presidents of International Colleges and Universities**

Convener: David G. Horner, President, American College of Greece

*Room 316*

**Presidents of Very Small Colleges and Universities (Under 600 FTE)**

Convener: Darron Collins, President, College of the Atlantic

*Rooms 312 and 313*

**Presidential Vocation and Institutional Mission Program Past Participants**

Convener: Frederik Ohles, President, Nebraska Wesleyan University, and Senior Advisor, CIC

*Room 315*

**Project Pericles Presidents**

Convener: Lyle D. Roelofs, President, Berea College
PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM
BREAKFAST ROUNDTABLE DISCUSSIONS

(Sponsored by TIAA)

Breakfast is provided for all registered presidential spouses and partners. Several Roundtables, led by presidential spouses facilitators, are designated for participants who wish to discuss specific topics.

**Campus Work**

- Building Relationships with Campus Employees
- Connecting with Commuter Students
- Creating Events and Programs on a Limited Budget
- Engaging with Students
- Favorite Event Themes

**Barbara N. Howard**, Presidential Spouse, Robert Morris University

**Cayce McCormick**, Presidential Spouse, Schreiner University

**Life Work**

- Balancing Privacy and a Public Role
- Balancing Professional Lives
- Issues for Spouses and Partners in Small Towns
- Living in a Fishbowl
- Unique Issues for Male Spouses

**Terry Aretz**, Presidential Spouse, University of Providence

**Steve Dietz**, Presidential Spouse, Reinhardt University

**Living Well**

- Healthy Eating
- Life Transitions—moving, starting a new job, retirement
- Mindfulness
- Running the presidential home
- Work-Life Balance

**Jennifer Gervasi**, Presidential Spouse, Ohio Dominican University
Is there a topic you would like to discuss that is not listed? Write your topic on one of the available cards and give it to Kathy Whatley or a member of the Task Force on Saturday morning for inclusion in Sunday, January 7 Breakfast Roundtable Discussions.

8:00 a.m.–5:00 p.m.

**INDIVIDUAL CONSULTATIONS**

Presidents have opportunities to schedule individual appointments with selected experts. Individual consultants’ schedules may vary. See page 20 for the full list of consultants. Please sign up in advance at the CIC Registration Desk.

8:30–9:45 a.m.

**PLENARY SESSION**

*Great Hall*

“**Innovation and ‘Intrepreneurship’ For Independent Higher Education**”

*(Sponsored by Metz Culinary Management)*

The rapid pace of recent technological innovation is perhaps nowhere more dramatic than in the field of artificial intelligence. Already leading to major changes in business, health care, and other industries, the implications of automated analysis and decision making for higher education—the industry that is most fundamentally focused on cultivating intelligence—are just emerging. How will these advances influence teaching and learning in residential undergraduate education rooted in the liberal arts? Can artificial intelligence improve how private colleges currently deliver undergraduate education or will it radically alter existing models? The recently retired head of IBM’s Watson business development units will discuss how these technological innovations could—and should—influence independent colleges and universities. He will argue for an “intrepreneurship” approach where college presidents lead change from within the organization.

*Michael D. Rhodin* recently retired as senior vice president of IBM, where he served for 33 years, including seven years as a corporate officer. He founded the IBM Watson business units that accelerated a new class of “cognitive” solutions, services, and applications to fuel a diverse cloud-based ecosystem of enterprises, academic institutions, and entrepreneurs. Prior to that, Rhodin founded IBM’s Smarter Planet solution units. He also was responsible for most of IBM’s European operations. Rhodin is a member of the supervisory board of TomTom,
an Amsterdam-based company that provides telematics, HD-mapping, and navigation devices. He also is a member of the international advisory board for Santander, a global financial services corporation, and serves on the board of directors of HZO, which specializes in electronics waterproofing systems. Rhodin is a member of the national advisory board of the University of Michigan’s computer science program. He recently was selected as a CIC Woodrow Wilson Visiting Fellow. Previously he served as a director of the Partnership for New York City, a nonprofit focused on economic development. Rhodin holds a BS in computer science from the University of Michigan, where he received an Alumni Merit Award in 2016. He also received an honorary doctor of science degree in 2016 from Roanoke College for his contributions to the development of artificial intelligence systems.

Chair: Nayef H. Samhat, President, Wofford College

9:45–10:15 a.m. Refreshment Break

Grand Ballroom Foyer 
(Sponsored by Yaffe & Company, Inc.)

10:15–11:30 a.m. CONCURRENT SESSIONS

Atlantic Ballroom 2

Building International Partnerships for Student Exchanges and Study Abroad

Student exchanges and study abroad provide excellent opportunities for educational enrichment and development of global citizenship for independent college students. Presidents can play a key role in developing and expanding partnerships with internationally based colleges, study abroad programs, and satellite campuses outside the United States. Presenters will discuss ways to expand international education opportunities.

MaryAnn Baenninger, President, Drew University

Joan M. Lescinski, CSJ, President, St. Ambrose University

Luis Roberto Mantilla Sahagún, Rector, Universidad Latina de América (Mexico)

Celeste M. Schenck, President, American University of Paris (France)

Chair: Steven C. Bahls, President, Augustana College (IL)
**Effective Strategies for Addressing Financial Challenges**

Many colleges face fiscal challenges that raise questions about pricing structures and business models. Increased competition, flat net tuition revenue, demand for additional services and facilities, few increases in faculty and staff productivity, and a number of “free college” initiatives are placing strains on campus budgets. Presidents may find themselves caught between a faculty that is resistant to change and a board that wants a healthy bottom line and better bond ratings. The session will explore different approaches to revising the financial model and will identify tools and strategies that presidents can deploy to foster financial health while recognizing the political challenges involved in institutional change.

*Carmen Twillie Ambar*, President, Oberlin College

* Lucie Lapovský, Principal, Lapovsky Consulting, and former President, Mercy College (NY)

Chair: *David W. Bushman*, President, Bridgewater College

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**Innovative Collaborations and Partnerships**

How might independent colleges and universities cooperate with one another to address mounting enrollment and economic challenges? How can strategic partnerships and collaboration help increase revenue, reduce costs, share strengths, and improve efficiency? What are the strategies to move beyond simply conceptualizing a co-venture or strategic alliance to implementing a partnership that can endure beyond leadership changes and annual admissions priorities? How can presidents look past competition to see collaboration? Presenters with a range of experiences will lead a discussion of these questions.

*Robert P. Bartlett*, President, Michigan Colleges Alliance

*Pamela A. Eibeck*, President, University of the Pacific

*James L. Martin*, Professor of English and former Provost, Mount Ida College, and co-author, *Consolidating Colleges and Merging Universities: New Strategies for Higher Education Leaders*

Chair: *Rolf Wegenke*, President, Wisconsin Association of Independent Colleges and Universities
Atlantic Ballroom 1

**Understanding the Next Generation of Students**

The demographic characteristics of college students are changing. How is the current group of students different from—and similar to—students on campus five years ago? What is different about their learning styles and lifestyles? What changes need to be considered regarding campus attitudes, processes, and facilities to accommodate new student expectations? How can colleges and universities help entering students adapt and thrive in their new communities? What approaches can presidents use to help the next generation of students feel welcome and a part of the campus?

Kevin Kruger, President, NASPA–Student Affairs Administrators in Higher Education

Chair: Barbara A. Farley, President, Illinois College

Regency Ballroom 2

**What’s New in Title IX: A President’s Guide to Ensuring Compliance and Avoiding Pitfalls**

Under the current administration, Title IX regulations and enforcement are changing. Litigation is on the rise as are appeals of existing rulings. What do presidents need to know about the current state of Title IX regulations and advisable practices? What is the president’s role in ensuring compliance? How can a president assure fairness while addressing common pitfalls in addressing sex discrimination in many forms—from inequities in intercollegiate athletics to sexual harassment and sexual assault?

Peter F. Lake, Professor of Law, Charles A. Dana Chair, and Director of the Center for Excellence in Higher Education Law and Policy, Stetson University College of Law

Chair: Andrea E. Chapdelaine, President, Hood College

**JOINT SESSION WITH PRESIDENTIAL SPOUSES AND PARTNERS**

Regency Ballroom 3

**Financial Planning for Presidents and Presidential Couples**

Presidents and presidential couples face particular financial circumstances both while in office and as they plan for retirement, including tax and social security planning and maintaining personal homes while living in college-owned housing. What are the most important financial matters for presidents and presidential couples to consider? What can be expected from a financial advisor? What are the key financial questions to ask?
**Serving on Boards**

Presidential spouses and partners often receive requests to serve on various types of boards. Serving on a governing or advisory board can be very rewarding but also draining. What are the best criteria for evaluating which invitations to accept and which to decline? Some boards are volunteer, some are paid, and some have expectations for fundraising. How can presidential spouses and partners navigate potential conflicts of interest, especially when college or university donors are involved? What are potential complications when other college employees serve on the same board? Spouses and partners who have served on boards will share their experiences.

**Refreshment Break and Boxed Lunches**

Boxed lunches are available for registered Institute participants. Please pick up a boxed lunch and proceed to one of the concurrent sessions.
11:45 a.m.–1:00 p.m.

**Concurrent Sessions**

(Sponsored by Ruffalo Noel Levitz)

**Regency Ballroom 2**

**Academic Prioritization: The President’s Role in Leading Curricular Change**

Private colleges and universities increasingly use academic prioritization to revise curricula in order to address changing market demand for academic programs and create greater fiscal efficiencies. What is the president’s role in leading curricular change? What models are especially suited to the smaller college environment? How can presidents navigate the often competing interests of faculty members, trustees, the chief academic officer, and the chief financial officer?

John C. Reynders, President, Morningside College

Beck A. Taylor, President, Whitworth University

Chair: Marylou Yam, President, Notre Dame of Maryland University

**Atlantic Ballroom 1**

**Creative Approaches to Foster Flourishing Language Programs**

The study of languages is an important component of a well-rounded and rigorous undergraduate education and essential for the preparation of graduates who are able to function effectively in a variety of careers, including international corporate and global security roles. Yet all too often, language courses are taught in ways that no longer serve 21st-century students. Under-enrolled courses can result in pressures to cut programs and faculty lines. Consider recommendations from the 2017 report of the American Academy of Arts & Sciences, *America’s Languages: Investing in Language Education for the 21st Century*. Learn about effective efforts to create flourishing language programs and the roles presidents can play in ensuring their success.

David R. Anderson, President, St. Olaf College

Katherine Bergeron, President, Connecticut College

Rosemary G. Feal, Mary L. Corrille Distinguished Visiting Professor in the Humanities, Wellesley College, and Executive Director Emerita, Modern Language Association

Chair: Isiaah Crawford, President, University of Puget Sound
Regency Ballroom 3

**Legal Issues That Keep Presidents Up at Night**

Which legal issues worry presidents the most? What actions can presidents take to mitigate risks? Two experienced higher education attorneys will lead a discussion on pressing legal issues such as faculty unionization efforts, constraints of tenure on financial restructuring, addressing conflicts of interest, controlling legal expenses, and understanding and complying with new regulatory issues arising from the current administration.

_Susan Llewellyn Deniker_, Attorney and Member, Steptoe & Johnson PLLC

_Jim Newberry_, Attorney and Member, Steptoe & Johnson PLLC

Chair: _David L. Beckley_, President, Rust College

Atlantic Ballroom 2

**Lessons for Presidential Practice from Recent Research**

A recent collaboration between CIC and the Association for the Study of Higher Education (ASHE) seeks to describe and translate findings from empirical research into actionable steps for presidents and other leaders of independent colleges and universities. The resulting book, just published, documents challenges and opportunities facing institutions in several integral areas with chapter reactions provided by presidents and chief academic officers. Contributors to the book will discuss key findings and lead a discussion of areas fruitful for additional research and institutional practice.

_Roger D. Drake_, President, Central Methodist University

_Christopher C. Morphew_, Dean, School of Education, Johns Hopkins University, and editor, _The Challenge of Independent Colleges: Moving Research into Practice_ (2017)

_Carolyn J. Stefanco_, President, The College of Saint Rose

Chair: _Norman Hipps, OSB_, President, Saint Vincent College
Presidential Considerations for College Mergers and Acquisitions

There is a long history of mergers in higher education, but the recent downturn in the economy and in the number of high school graduates has accelerated pressures on colleges and universities to consider consolidations. How can merging institutions preserve distinctive educational offerings and capitalize on complementary strengths while streamlining expenses and improving market position? What do presidents need to know in order to assess whether a potential merger might be advantageous for mission, program, and the bottom-line? When and how should presidents involve key constituents— the board, the faculty, current students, and the alumni, among others? Presidential colleagues with a range of experiences will lead the discussion.

David J. Chard, President, Wheelock College

Troy D. Hammond, President, North Central College (IL)

Cynthia Zane, President, Hilbert College

Chair: José A. Bowen, President, Goucher College

Presidents “Open Mike”

(Open only to currently serving college and university presidents)

This forum is an opportunity to raise confidential and sensitive questions and issues. The discussion is expected to be candid and broad-ranging from specific administrative matters to institutional structures and staffing, to dealings with the board, and to the relationship between a president’s professional and personal lives. Advice will come from other participating presidents.

Moderator: Judith Maxwell Greig, President, Notre Dame de Namur University
11:45 a.m.–1:00 p.m.  
**PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM**  
**CONCURRENT SESSIONS**  
*(Sponsored by TIAA)*

**Grand Ballroom West**

**The Presidential Spouse or Partner Contract**

Presidential spouses or partners can have paid contracts, volunteer contracts, or no contracts. What are the advantages and challenges of having a contract? How can a contract protect both the spouse or partner and the college? What issues and situations should be addressed in a contract? Who should sign on behalf of the college? How are conflicts over the contract resolved? Presidential spouses and a higher education attorney will share models of contracts and lead the discussion.

Michelle Dorsey, Presidential Spouse, Texas Lutheran University  
Darron Farha, Vice President, General Counsel, and Secretary to the Board of Directors, Valparaiso University  
Veronica Heckler, Presidential Spouse, Valparaiso University  
René E. Johnson, Presidential Spouse, Director of Servant Leadership Program, and Assistant Professor of Religion, Finlandia University  
Chair: Lillian Kay Webb, Presidential Spouse, University of Pikeville

**Rooms 312 and 313**

**The Presidential Spouse’s or Partner’s Role in Building Public Confidence in Higher Education**

Surveys indicate that Americans are losing trust in many societal institutions: governments, media, churches, public schools, and colleges and universities. The causes of this erosion are multiple. How can presidential spouses and partners leverage their positions to strengthen public trust and confidence in their institutions at the local and regional level? What are effective ways to work with community institutions to increase trust and confidence in higher education?

Donna Brazil, Presidential Spouse, Mount St. Mary’s University (MD)  
Suzie Martin Gonzalez, Presidential Spouse, Kalamazoo College  
Jesse Huxman, Presidential Spouse, Eastern Mennonite University  
Chair: Diane Pierce-Williams, Presidential Spouse, Muhlenberg College

1:00–1:30 p.m.  
**Refreshment Break**  
*(Sponsored by Ideas for Action, LLC)*  

Grand Ballroom Foyer
1:00–2:00 p.m.  **MEETINGS OF CIC STATE COUNCIL MEMBER ORGANIZATIONS**

**Room 318**

**Associated Colleges of Illinois**
Convener: **Barbara A. Farley**, President, Illinois College

**Room 316**

**Independent Colleges of Indiana**
Convener: **David Wantz**, President and Chief Executive Officer

**Room 314**

**North Carolina Independent Colleges and Universities**
Convener: **A. Hope Williams**, President

**Room 319**

**Ohio Foundation of Independent Colleges**
Convener: **Bill Spiker**, President

**Room 320**

**Wisconsin Association of Independent Colleges and Universities**
Convener: **Rolf Wegenke**, President

1:00–2:00 p.m.  **NetVUE Focus Group** *(By invitation only)*  
**Room 317**
Convener: **Daniel O. Aleshire**, NetVUE Program Evaluator, CIC

1:30–3:30 p.m.  **PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM NETWORKING AND DISCUSSION SESSIONS**

**(Sponsored by TIAA)**

**Rooms 312 and 313**

1:30–2:25 p.m.  **Organizing to Move**

Moving can be a daunting experience. Come share tips on what to take, store, or discard; how to pack; how to prepare the presidential residence (for arrival or departure); how to deal with living in temporary accommodations; and who should pay for what during a move.

Facilitators: **Jennifer Gervasi**, Presidential Spouse, Ohio Dominican University, and **Brian Kell**, Presidential Spouse, Albright College
2:35–3:30 p.m. • **Planning Programs for Trustees’ Spouses and Partners**

Spouses and partners who have planned programs for trustees’ spouses and partners will share ideas about programs that worked and invite contributions from others.

Facilitators: **Sheila J. Garren**, Presidential Spouse, Lynchburg College, and **Jennifer Troha**, Presidential Spouse, Juniata College

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1:30–5:00 p.m.

*Meet in the hotel lobby.*

**Optional Excursion:**

**Wynwood: A History of Street Art**

*Please note: Pre-registration is required.*

*Inquire at the CIC Registration Desk.*

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2:00–3:30 p.m.

**Regency Ballrooms 2 and 3**

**PRESIDENTIAL FORUM ON DIVERSITY, CIVILITY, AND FREE SPEECH**

*(Open only to currently serving college and university presidents and their spouses and partners)*

Recent incidents of campus unrest have jeopardized a delicate balance between free speech and inclusion efforts. Some episodes have led to the disininvitation of controversial speakers, the shutdown of campus events, and even violence. Administrative and faculty efforts to craft “free speech codes” often have been met with strong disapproval by students. These occurrences have placed great strains on the resources of smaller private colleges and universities and threatened to undermine the campus sense of community. What constitutes “hate speech” and should it be protected? How effective are “free speech zones”? What efforts can be undertaken to make the campus into a learning community focused on diversity, civility, and a broad understanding of freedom of expression? What is the role of the president in these complex and contentious situations?

The candid discussion will begin with observations from those who have encountered these issues and will encourage others to share their insights and questions.

**Joanne Berger-Sweeney**, President, Trinity College (CT)

**Frederick M. Lawrence**, Secretary and CEO, The Phi Beta Kappa Society

**Laurie Patton**, President, Middlebury College

Moderator: **Beverly Daniel Tatum**, President Emerita, Spelman College, and Director, Diversity, Civility, and the Liberal Arts Institute, CIC
Making Strategic Decisions in a “Free College” Environment

(Sponsored by AGB Search, LLC)

The emphasis on “free public education for all” is creating an intensified competitive environment where the value of private colleges and universities is more hotly contested than ever. Traditional efforts to persuade students and their families of the distinctive educational and co-curricular experiences and post-graduation benefits of a private college education may not be enough. What critical tactics must presidents assure are addressed, planned, and deployed to respond to these new pressures? How can a president double down on the value proposition while creating a long-term strategy to position the institution to be more competitive than it is today?

This workshop will provide presidents with clear and concise steps to lead their institutions in this quickly evolving environment. An interactive discussion will explore current trends and likely developments. The workshop will tackle topics, such as how to:

• Deploy a competitive marketing strategy;
• Assess price and value;
• Evaluate financial aid and affordability; and
• Make strategic enrollment plans.

Presenters will address critical decision points for strategic planning in a “free college” environment. The session will include working group exercises to create plans based on case examples.

Marjorie Hass, President, Rhodes College

Patricia L. Maben, Senior Vice President, Product Strategy, Ruffalo Noel Levitz

Kenneth M. Macur, President, Medaille College

Lewis Sanborne, Vice President, Strategic Enrollment Planning, Ruffalo Noel Levitz

Chair: Donald B. Taylor, President, Cabrini College
4:00–5:00 p.m.  
**ASSOCIATED MEETINGS**

**Room 317**

**Association of Adventist Colleges and Universities**

Convener: Gordon Bietz, Chief Executive Officer and retired President, Southern Adventist University

**Room 301**

**Association of Presbyterian Colleges and Universities**

Convener: John L. Comerford, President, Blackburn College

6:00–7:00 p.m.  
**AWARDS RECEPTION**

South Palm Court  
(Sponsored by Gonser Gerber LLP)

7:00–9:00 p.m.  
**AWARDS BANQUET**

Great Hall  
(Sponsored by National Management Resources Corporation and Sodexo)

**Welcome and Introductions**

**Invocation**

**Dinner**

**Presentations**

**Award for Philanthropy (Individual)**  
Ronda E. Stryker and William D. Johnston

**Award for Philanthropy (Organization)**  
Newman’s Own Foundation

**Allen P. Splete Award for Outstanding Service**  
(Sponsored by Jenzabar)  
Ernesto Nieto

Please note: The Awards Reception and Banquet are included with the Presidents Institute registration. Participants who would like to include special guests—such as trustees, donors, alumni, or other friends—are asked to inquire at the CIC Registration Desk about the purchase of tickets.
Sunday, January 7

7:00–11:30 a.m. 
**Institute Registration**
*Grand Ballroom Foyer*
Sign up for Individual Consultations and other events with space limitations.

7:00–7:30 a.m. 
**Ecumenical Worship Service**
*Atlantic Ballroom 1*
Presiding: **Burton J. Webb**, President, University of Pikesville

**Additional Worship Options**
Participants have the opportunity to attend worship services in the community provided by a variety of religious organizations, including Jewish, Muslim, and both Protestant and Roman Catholic Christian congregations. A list of local places of worship is provided in the Institute Guidebook app.

7:30–8:30 a.m. 
**CIC Annual Business Meeting**
*Regency Ballrooms 2 and 3*
The Annual Business Meeting is open to all CIC member presidents. Breakfast will be provided.

*Chair’s Report*

*President’s Report*

*Nominations Committee Report*

*Treasurer’s Report*

*Secretary and Membership Committee Report*

**Special Reports:**

- **Recent Resource Development Activities**
  **Pamela J. Gunter-Smith**, Vice Chair for Resource Development, CIC Board of Directors, and President, York College of Pennsylvania

- **State of the CIC State Council Programs**
  **A. Hope Williams**, Member, CIC Board of Directors, and President, North Carolina Independent Colleges and Universities

- **Federal Legislative and Regulatory Update**
  **David L. Warren**, President, National Association of Independent Colleges and Universities
7:30–8:30 a.m.  
Grand Ballroom East  

**Breakfast**  
*(Sponsored by Orbis Education)*  

Breakfast is provided for those not participating in the CIC Annual Business Meeting.

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7:30–8:30 a.m.  
Grand Ballroom West  

**PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM**  
**BREAKFAST ROUNDTABLE DISCUSSIONS**  
*(Sponsored by TIAA)*  

Breakfast is provided for all registered presidential spouses and partners. Several Roundtables, led by presidential spouses and partner facilitators, are designated for participants who wish to discuss specific topics.

**Community Involvement**
- Visibility in the Community
- How Does My Service in the Community Help My College or University?
- Impact on Alumni and Donor Relations
- Student and Faculty Engagement in the Community
- Communicating with Donors and Alumni in Coordination with the Advancement Office

*Rosemary Ohles*, Presidential Spouse, Nebraska Wesleyan University

**Life Work**
- Balancing Privacy and a Public Role
- Balancing Professional Lives
- Issues for Spouses and Partners in Small Towns
- Living in a Fishbowl
- Unique Issues for Male Spouses

*Traci Corey*, Presidential Spouse, Olivet College  
*Roger Fell*, Presidential Spouse, The University of Findlay

**Living Well**
- Healthy Eating
- Life Transitions—Moving, Starting a New Job, Retirement
• Mindfulness
• Running the Presidential Home
• Work-Life Balance

**Christy Colson**, Presidential Spouse, Wartburg College

**Carole Campbell Williams**, Presidential Spouse, Mount St. Joseph University

8:30–11:30 a.m.

**INDIVIDUAL CONSULTATIONS**

Presidents have opportunities to schedule individual appointments with selected experts. Individual consultants’ schedules may vary. See page 20 for the full list of consultants. Please sign up in advance at the CIC Registration Desk.

8:45–9:45 a.m.

**CONCURRENT SESSIONS**

*(Sponsored by Strada Education Network)*

*Regency Ballroom 1*

**Developing and Evaluating the Senior Team**

Building a competent and cohesive senior leadership team is an important presidential responsibility. Which approaches to staff development work well? What are the most effective instruments or practices for evaluating the overall performance of the team as well as that of individual team members? Two consultants and an experienced president will lead the discussion and provide examples.

**Jorge L. Diaz-Herrera**, President, Keuka College

**Kenneth Ryalls**, President, IDEA

**Alexander C. Yaffe**, President and CEO, Yaffe & Company, Inc.

Chair: **Kathy Brittain Richardson**, President, Westminster College (PA)
Atlantic Ballroom 3

**We Have a Marketing and Branding Problem, Not an Enrollment Problem**

Presenters will share unvarnished insights in a case study format about how a strategic approach to marketing and branding can help to achieve enrollment growth and success. This session will outline a step-by-step strategic marketing communications process to overcome many of the core obstacles to enrollment growth. Presenters and participants will discuss such topics as how presidents can monitor research and benchmarks, establish strategic enrollment goals, and deploy a refreshed enrollment-focused marketing strategy.

**Michael C. Maxey**, President, Roanoke College

**Edward Sirianno**, President, Creative Communication Associates

Chair: **Helen J. Streubert**, President, College of Saint Elizabeth

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**JOINT SESSION WITH PRESIDENTIAL SPOUSES AND PARTNERS**

Atlantic Ballroom 2

**Book Study: Hillbilly Elegy: A Memoir of a Family and Culture in Crisis by J.D. Vance**

*Hillbilly Elegy* is a powerful memoir of the hope for upward mobility and the disappointment that comes when success does not eliminate difficult family issues. The analysis of the cultural crisis affecting poor Americans in Appalachia is moving, personal, and reflects the stories and struggles of many first-generation college students. This session will include a video interview with two Appalachian culture scholars, small-group discussions around tables, and a guided larger group discussion of the themes emphasized by Vance. It is recommended (but not required) that participants read the book in advance.

**Kenneth Hasseler**, Presidential Spouse, Muskingum University

**Susan S. Hasseler**, President, Muskingum University

**Laurie Roelofs**, Presidential Spouse, Berea College

**Lyle D. Roelofs**, President, Berea College

Chair: **Randy Richardson**, Presidential Spouse, Westminster College (PA)
Atlantic Ballroom 1

**PRESIDENTIAL SPOUSES AND PARTNERS PROGRAM**

**CONCURRENT SESSION**

*(Sponsored by TIAA)*

**Increase Balance, Decrease Stress**

The role of presidential spouse or partner is full of joys, challenges, and stresses. Pressures can come from scheduling demands, events to attend, and family members to look after, as well as jobs and opportunities for travel. Learn from other spouses and partners about ways to be mindful of the balance in your life and how to manage stress.

**Lisa Baldwin**, Presidential Spouse, Centenary University (NJ)

**Tina Dalrymple**, Presidential Spouse, Columbia College (MO)

**Andrea Le Roy**, Presidential Spouse, Calvin College

Chair: **Roger Auerbach**, Presidential Spouse, University of La Verne

9:45–10:00 a.m.

**Refreshment Break**

*(Sponsored by Dynamic Campus)*

10:00–11:30 a.m.

**CLOSING PLENARY SESSION**

**“Resilient and Innovative Presidential Leadership”**

*(Sponsored by Registry for College and University Presidents)*

Keen vision and uncommon resilience are the traits most valued in presidents who lead independent colleges and universities along paths that sustain excellence. How can presidents effectively guide their institutions to recognize and embrace the challenges and opportunities they face? What criteria should presidents use to select among the choices of innovative programs and approaches? How do presidents cultivate nimble, adaptive, and culturally responsive leadership among the faculty and staff? How can trustees, donors, and community and business partners be persuaded by the compelling reasons to support independent undergraduate education grounded in the liberal arts? How should presidents balance the benefits of innovation and the durability of long-standing institutional mission and tradition? A panel of presidents will discuss how they have approached these issues and will encourage others to share their insights and questions.
Mary B. Marcy began her tenure in 2011 as the ninth president of Dominican University of California. Her efforts to create a distinctive student experience that highlights signature work, academic excellence, mentoring, and engagement have led to an increase in the four-year graduation rate at Dominican by more than 84 percent over the last six years. This progress has earned Dominican the Higher Education Civic Engagement Award from the Washington Center. Prior to joining Dominican, Marcy served as provost of Bard College at Simon’s Rock and vice president of Bard College. She also was dean of university relations and planning at Antioch University Seattle and was the policy advisor to the president of Western Washington University. Marcy was an Arthur Vining Davis Fellow at the Aspen Ideas Festival. She is a member of the CIC Board of Directors, served on the Steering Committee of CIC’s Project on the Future of Independent Higher Education, and is a member of the CIC New Presidents Program Advisory Committee. Marcy earned a BA in political science and communications with honors from the University of Nebraska and a DPhil and MPhil in politics from the University of Oxford.

Kevin M. Ross became president of Lynn University in 2006. Under his leadership, the university has implemented a redesigned core curriculum, called Dialogues; a first-year student experience, titled The Citizenship Project; and a three-year undergraduate degree program. In addition, Lynn has developed partnerships to provide just-in-time job skills in emerging careers for students to complement Lynn’s liberal arts education with professional development opportunities in technology and social entrepreneurship. For two consecutive years, Lynn was named one of the most innovative universities in the country by U.S. News & World Report and was recognized as an Apple Distinguished School for its iPad initiative. Ross previously served Lynn as associate dean of the College of International Communication, director of special projects, director of development, vice president for institutional advancement, and chief operating officer. Ross currently serves on the Watson University advisory board and the Millennium Campus Network board of directors. He is a member of the CIC Board of Directors and served on the Steering Committee of CIC’s Project on the Future of Independent Higher Education. Ross earned an AB in English from Colgate University, an MA in liberal arts from St. John’s College (MD), and a doctorate in higher education from Vanderbilt University.
John I. Williams, Jr., became Muhlenberg College’s 12th president in 2015. He has launched the college on a new institutional strategy, introduced an array of innovative programmatic and marketing efforts, and initiated an analytical approach to improve student learning and the residential experience. Williams came to Muhlenberg after a career as a specialist in entrepreneurial strategy and innovation, including experience working with liberal arts colleges. He held leadership positions at Bain & Company and later American Express, where he was senior vice president for strategic planning, head of the U.S. Platinum Card business, and head of the U.S. Consumer Travel Network. He served as CEO of Biztravel.com, a successful dot-com startup, led the consulting unit of Eduventures, and was a partner in the higher education practice at the Bridgespan Group. Williams also served as an expert-in-residence at Harvard’s Innovation Lab and as a trustee of Amherst College. He previously was a board member of Prep for Prep, a nonprofit organization that serves New York City’s most promising students of color, a board member of Boston’s Museum of African American History, and a member of the board of trustees of the Kent School in Kent, Connecticut, his alma mater. Williams graduated from Amherst College with a bachelor’s degree in economics and earned both JD and MBA degrees from Harvard University.

Moderator: Christopher C. Morphew is dean of the School of Education of Johns Hopkins University. He previously served as professor and executive associate dean in the College of Education at the University of Iowa. Morphew has held tenured faculty positions at the University of Kansas and the University of Georgia. His research has been published in many journals including the Journal of Higher Education, Review of Higher Education, Studies in Higher Education, and Higher Education Policy and has been supported by the National Science Foundation, the Lumina Foundation, and the Kauffman Foundation. Morphew is co-author of the CIC research report Changes in Faculty Composition at Independent Colleges (2016). His most recent book, The Challenges of Independent Colleges, is a product of the CIC-ASHE collaboration. It is co-edited with John Braxton and was published by Johns Hopkins University Press in November 2017. Morphew earned a BA in government and philosophy from the University of Notre Dame, an EdM from Harvard University, and an MA and PhD in sociology of education from Stanford University.

Chair: Colleen Perry Keith, President, Pfeiffer University
### Presidents Institute Spouses and Partners Task Force Luncheon

**Noon–1:30 p.m.**  
**Room 317**  
**Presidents Institute Spouses and Partners Task Force Luncheon**

Convener: Betty Neal Crutcher, Co-Chair, and Presidential Spouse, University of Richmond, and Mary L. Trettin, Co-Chair, and Presidential Spouse, Northland College

### American Academic Leadership Institute Board of Directors Meeting

**12:15–8:00 p.m.**  
**Room 320**  
**American Academic Leadership Institute Board of Directors Meeting**

Convener: Linda M. Bleicken, President

### Associated Colleges of the South

**4:00–9:00 p.m.**  
**Room 302**  
**Associated Colleges of the South**

Convener: Edward B. Burger, President, Southwestern University (TX)

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### Monday, January 8

**9:00 a.m.–5:00 p.m.**  
**Associated Colleges of the South**  
**Rooms 301 and 302**  
Convener: Edward B. Burger, President, Southwestern University (TX)

### Tuesday, January 9

**9:00 a.m.–2:00 p.m.**  
**Associated Colleges of the South**  
**Rooms 301 and 302**  
Convener: Edward B. Burger, President, Southwestern University (TX)
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Save the Dates!

2019 PRESIDENTS INSTITUTE

January 4–7, 2019
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