2014 INSTITUTE for CHIEF ACADEMIC and CHIEF FINANCIAL OFFICERS

November 1–4, 2014 • Hilton Portland & Executive Tower • Portland, Oregon

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Table of Contents

Schedule-at-a-Glance ............................................................. 2
Workshop for New Chief Academic Officers ............................... 6
Workshop for CAOs in Their Third or Fourth Year of Service ............... 9
Pre-Institute Events .................................................................... 11
Saturday, November 1 ................................................................. 13
Sunday, November 2 .................................................................. 16
Monday, November 3 ................................................................. 29
Tuesday, November 4 ................................................................. 40
Post-Institute Events ................................................................. 46
Appendix ................................................................................... 47
Hotel Information ...................................................................... 54
CAO Task Force ......................................................................... inner back cover
**Schedule-at-a-Glance**

**Saturday, November 1**

**PRE-INSTITUTE EVENTS**

7:30 a.m.–5:00 p.m.
Institute Registration and Idea Exchange
*Plaza Foyer*

7:30 a.m.–4:30 p.m.
**Workshop for New CAOs**
*Pavilion Ballroom East*

7:30 a.m.–4:00 p.m.
**Workshop for CAOs in Their Third or Fourth Year of Service**
*Broadway I and II*

7:30–9:00 a.m.
**Lutheran Colleges and Universities CAOs and CFOs Meeting**
*Skyline III*

8:00 a.m.–9:00 p.m.
**Senior Leadership Academy**
(By invitation only)
*Skyline I and II*

9:00 a.m.–3:00 p.m.
**Mennonite Colleges CAOs and CFOs Meeting**
*Cabinet Suite*

10:00 a.m.–Noon
**Concordia University System CAOs and CFOs Meeting**
*Skyline IV*

Noon–4:00 p.m.
**TIAA-CREF Consultations**
*Boardroom East, Boardroom West, and Executive Suite*

2:30–4:30 p.m.
**Catholic Colleges and Universities CAOs and CFOs Meeting**
*Forum Suite*

3:00–4:00 p.m.
**CAO Mentors Meeting**
*Studio Suite*

3:30–4:30 p.m.
**CAO/CFO Task Force Meeting**
*Cabinet Suite*

4:00–4:30 p.m.
**Mentors Meet New CAOs**
*Pavilion Ballroom East*

6:30–7:15 p.m.
**Welcoming Reception**
*Plaza Foyer*

7:15–9:00 p.m.
**Buffet Dinner**
*Pavilion Ballroom*

**Sunday, November 2**

7:00 a.m.–5:00 p.m.
Institute Registration and Idea Exchange
*Plaza Foyer*

7:15–8:45 a.m.
**NetVUE Focus Group**
(By invitation only)
*Senate Suite*

7:30–8:45 a.m.
**Breakfast Discussions**
*Pavilion Ballroom*

8:00–8:30 a.m.
**Ecumenical Worship Service**
*Parlors A, B, and C*

8:00 a.m.–Noon
**Senior Leadership Academy**
(By invitation only)
*Skyline I and II*

5:00–6:30 p.m.
**WELCOME AND KEYNOTE ADDRESS**
*Arthur Levine*
*Grand Ballroom*
8:00 a.m.–5:00 p.m.  
TIAA-CREF Consultations  
Boardroom East, Boardroom West, and Executive Suite

8:00 a.m.–5:00 p.m.  
CAO/CFO Spouses and Partners Hospitality Room  
Forum Suite

9:00–10:15 a.m.  
PLENARY SESSION  
Diana G. Oblinger  
Grand Ballroom

9:00–10:15 a.m.  
PLENARY SESSION  
Diana G. Oblinger  
Grand Ballroom

10:30–11:45 a.m.  
Welcome Coffee for CAO/CFO Spouses and Partners  
Forum Suite

10:30–11:45 a.m.  
Welcome Coffee for CAO/CFO Spouses and Partners  
Forum Suite

10:30–11:45 a.m.  
CONCURRENT SESSIONS  
Adjunct Unionization: Coming Soon to a Campus Near You?  
Galleria North

10:30–11:45 a.m.  
CONCURRENT SESSIONS  
Adjunct Unionization: Coming Soon to a Campus Near You?  
Galleria North

Balancing the Quantitative and Human Sides of Curriculum Analysis  
Broadway I and II

Balancing the Quantitative and Human Sides of Curriculum Analysis  
Broadway I and II

Conflicting Realities: Bridging the Gap between Digital Natives and Digital Immigrants  
Broadway III and IV

Conflicting Realities: Bridging the Gap between Digital Natives and Digital Immigrants  
Broadway III and IV

Non-Traditional Scholarship and the Tenure and Promotion Process  
Galleria South

Non-Traditional Scholarship and the Tenure and Promotion Process  
Galleria South

Undergraduate Research Consortia—Great Lakes Colleges Association  
Parlors A, B, and C

Undergraduate Research Consortia—Great Lakes Colleges Association  
Parlors A, B, and C

11:45 a.m.–1:25 p.m.  
Free Time for Lunch

11:45 a.m.–1:25 p.m.  
Free Time for Lunch

Noon–1:25 p.m.  
Luncheon and Discussion Groups for Women CAOs and CFOs  
Pavilion Ballroom East

Noon–1:25 p.m.  
Luncheon and Discussion Groups for Women CAOs and CFOs  
Pavilion Ballroom East

1:30–2:45 p.m.  
CONCURRENT SESSIONS  
“Big History” as General Education  
Broadway I and II

1:30–2:45 p.m.  
CONCURRENT SESSIONS  
“Big History” as General Education  
Broadway I and II

College-Owned Housing for Faculty and Staff Members  
Broadway III and IV

College-Owned Housing for Faculty and Staff Members  
Broadway III and IV

Enrollment Management  
Galleria South

Enrollment Management  
Galleria South

Sustainable, Affordable Models for Campus Internationalization  
Parlors A, B, and C

Sustainable, Affordable Models for Campus Internationalization  
Parlors A, B, and C

Title IX: Compliance and Best Practices  
Galleria North

Title IX: Compliance and Best Practices  
Galleria North

CAO/CFO Spouses and Partners Session  
Forum Suite

CAO/CFO Spouses and Partners Session  
Forum Suite

3:00–4:15 p.m.  
CONCURRENT SESSIONS  
Cooperating with Community Colleges: Innovative Strategies for Attracting and Retaining Transfer Students  
Galleria North

3:00–4:15 p.m.  
CONCURRENT SESSIONS  
Cooperating with Community Colleges: Innovative Strategies for Attracting and Retaining Transfer Students  
Galleria North

Crash Course: Crafting a Strategic Internationalization Plan  
Broadway III and IV

Crash Course: Crafting a Strategic Internationalization Plan  
Broadway III and IV

Facilities and Financial Modeling for the Sciences and the Fine and Performing Arts: Flashpoint Issues for the CAO and the CFO  
Parlors A, B, and C

Facilities and Financial Modeling for the Sciences and the Fine and Performing Arts: Flashpoint Issues for the CAO and the CFO  
Parlors A, B, and C

3:00–4:15 p.m.  
CONCURRENT SESSIONS  
Cooperating with Community Colleges: Innovative Strategies for Attracting and Retaining Transfer Students  
Galleria North

3:00–4:15 p.m.  
CONCURRENT SESSIONS  
Cooperating with Community Colleges: Innovative Strategies for Attracting and Retaining Transfer Students  
Galleria North

Historical Overview of the Pacific Northwest  
Joint Session with Spouses and Partners  
Liberty III

Historical Overview of the Pacific Northwest  
Joint Session with Spouses and Partners  
Liberty III

5:30–6:15 p.m.  
Executive Leadership Academy and Senior Leadership Academy Alumni Reception  
Skyline III

5:30–6:15 p.m.  
Executive Leadership Academy and Senior Leadership Academy Alumni Reception  
Skyline III
Monday, November 3

7:00 a.m.–5:00 p.m.
Institute Registration and Idea Exchange
Plaza Foyer

7:30 a.m.–5:00 p.m.
CAO/CFO Spouses and Partners Hospitality Room
Forum Suite

7:30–8:30 a.m.
Annapolis Group CAOs and CFOs Breakfast
Skyline III

7:30–8:30 a.m.
Association of Colleges of Sisters of Saint Joseph CAOs and CFOs Breakfast
Pavilion Ballroom

7:30–8:30 a.m.
Breakfast Discussions
Pavilion Ballroom

8:00 a.m.–5:00 p.m.
TIAA-CREF Consultations
Boardroom East, Boardroom West, and Executive Suite

8:45–10:00 a.m.
PLENARY SESSION
Caroline M. Hoxby
Grand Ballroom

10:15–11:15 a.m.
CONCURRENT SESSIONS

Artful Collaborations: The Creative Campus
Broadway I and II

College Choice, Access, and Success for Low-Income, High-Achieving Students
Parlors B and C

Effective Endowment Management Practices
Broadway III and IV

Hiring and Evaluation Part I: Best Practices for Hiring
Galleria South

The Affordable Care Act: What It Means for the Institution, Adjunct Faculty, and Students
Galleria North

11:30 a.m.–12:30 p.m.
CONCURRENT SESSIONS

First Year Undergraduate Enrollment: Fall 2014 Results and Analysis
Galleria North

Hiring and Evaluation Part II: Best Practices for Performance Evaluation
Galleria South

Open Mike for CAOs and CFOs
Parlors B and C

11:30 a.m.–12:30 p.m.
CAO/CFO Spouses and Partners Session
Forum Suite

12:30–1:50 p.m.
Free Time for Lunch

12:30–1:50 p.m.
Conference for Mercy Higher Education CAOs and CFOs Luncheon
Skyline IV

Missouri CAOs and CFOs Luncheon
Meet in hotel lobby.

Oregon Alliance of Independent Colleges & Universities CAOs and CFOs Luncheon
Pavilion Ballroom West

Women’s College Coalition Luncheon for CAOs
Skyline III

1:30–5:00 p.m.
Optional Excursion Portland Sightseeing Tour
Meet in hotel lobby.
2:00–3:15 p.m.
**CONCURRENT SESSION**
Reforming and Extending the Traditional Transcript: Toward a Postsecondary Achievement Report
*Broadway I and II*

2:00–5:00 p.m.
**WORKSHOPS**
Faculty Workload and Compensation
*Galleria North*

Integrated Planning, Resource Allocation, and Assessment
*Galleria South*

Sophomore to Junior Year Retention
*Broadway III*

Strategic Uses of Information Technology
*Broadway IV*

6:00 p.m.
Free Time for Dinner

**MEETINGS OF ASSOCIATED ORGANIZATIONS**

6:00 p.m.
Association of Presbyterian Colleges and Universities CAOs and CFOs
*Meet at restaurant.*

Council for Christian Colleges & Universities CAOs
*Skyline II*

6:30 p.m.
American Benedictine Colleges CAOs and CFOs
*Meet in hotel lobby.*

Association of Dominican Colleges and Universities CAOs and CFOs
*Meet in hotel lobby.*

General Board of Higher Education and Ministry, United Methodist Church CAOs and CFOs
*Skyline III*

**Tuesday, November 4**

7:00 a.m.–Noon
Institute Registration and Idea Exchange
*Plaza Foyer*

7:30–8:45 a.m.
Breakfast
*Pavilion Ballroom*

**CAO/CFO Spouses and Partners Breakfast**
*Pavilion Ballroom*

Historically Black Colleges and Universities Breakfast for CAOs and CFOs
*Pavilion Ballroom*

Yes We Must Coalition Breakfast for CAOs and CFOs
*Pavilion Ballroom*

8:00 a.m.–Noon
TIAA-CREF Consultations
*Boardroom East, Boardroom West, and Executive Suite*

**CAO/CFO Spouses and Partners Hospitality Room**
*Forum Suite*

8:45 a.m.–Noon
*Tidbit of Interest*

9:00–10:15 a.m.
**CONCURRENT SESSIONS**
Adjunct Faculty: Issues of Support and Fair Treatment
*Broadway I and II*

Athletics: Finances and Supervision
*Galleria North*

Competency-Based Education
*Broadway III and IV*

Retirement Transitions for Faculty Members
*Galleria South*

Strategies to Increase the Marketability of Academic Programs
*Parlors B and C*

9:00–10:15 a.m.
CAO/CFO Spouses and Partners Session
*Forum Suite*

10:45 a.m.–Noon
**CLOSING PLENARY SESSION**

**INSTITUTE ADJOURNS**

**POST-INSTITUTE EVENTS**

12:15–2:30 p.m.
CAO/CFO Task Force Meeting
*Studio Suite*

12:15–5:00 p.m.
Wesleyan Holiness Consortium CAOs
*Cabinet Suite*

1:30–5:30 p.m.
Optional Excursion Multnomah Falls and Gorge Waterfalls
*Meet in hotel lobby.*
Workshop for New Chief Academic Officers

SATURDAY, NOVEMBER 1

7:30 a.m.  Continental Breakfast
Pavilion Ballroom East

8:00–8:05 a.m.  Welcome
Kathy Whatley, Vice President for Annual Programs, CIC

8:05–8:45 a.m.  Introductions, New CAO Workshop Coordinators
Jonathan D. Green, Provost and Dean of the Faculty, Illinois Wesleyan University
Cheryl Johnson-Odim, Provost and Senior Vice President for Academic Affairs, Dominican University (IL)
Michael A. McDonald, Provost, Kalamazoo College
Jeanine Silveira Stewart, Provost and Dean of the Faculty, McDaniel College

8:45–10:00 a.m.  Developing Professional Relationships to Meet New Expectations
Cynthia Zane, President, Hilbert College
Moderator: Cheryl Johnson-Odim

10:00–10:15 a.m.  Break
10:15 a.m.–Noon  
**Case Studies**

*Dominic Aquila*, Vice President for Academic Affairs, University of St. Thomas (TX)

*Debbie Mauldin Cottrell*, Vice President for Academic Affairs, Texas Lutheran University

*William C. Deeds*, Provost, Morningside College

*Susan S. Hasseler*, Senior Vice President for Academic Affairs and Dean of the College, Augustana College (SD)

*Leanne M. Neilson*, Provost and Vice President for Academic Affairs, California Lutheran University

*John Swallow*, Provost, Sewanee: The University of the South

Moderator: *Jonathan D. Green*

12:15–1:15 p.m.  
**Lunch**

*Pavilion Ballroom West*

1:15–1:30 p.m.  
**Welcome**

*Richard Ekman*, President, CIC

1:30–3:00 p.m.  
**ROUND TABLE DISCUSSIONS**

**Accreditation**

*Michael Selmon*, Provost and Vice President for Academic Affairs, Alma College

**Assessment and Institutional Effectiveness**

*Darin Fields*, Vice President for Academic Affairs, The University of Findlay

**Crisis and Risk Management on Campus**

*Sherry Fraser*, Provost, Concordia College (NY)

**Faculty Governance and Faculty Leadership**

*Chad Berry*, Academic Vice President and Dean of the Faculty, Berea College

*Rita E. Knuesel*, Provost, College of Saint Benedict/Saint John’s University

**Working with the Chief Financial Officer**

*Kenneth M. Macur*, Provost and Dean of the College, Bethany College (KS)

**Working with the Chief Student Affairs Officer**

*Dean Pribbenow*, Vice President for Academic Affairs and Academic Dean, Edgewood College

Moderator: *Jeanine Silveira Stewart*
3:00–3:15 p.m.  
**Break**

3:15–3:50 p.m.  
**Panel: Group Questions and Answers**

*Jonathan D. Green, Cheryl Johnson-Odim, Michael A. McDonald, and Jeanine Silveira Stewart*

3:50–4:00 p.m.  
**Reflection: What Will I Take Back to Campus?**

Moderator: *Michael A. McDonald*

4:00–4:30 p.m.  
**Mentors Meet New CAOs**

Mentor Coordinators:

*Mark J. Braun*, Provost, Gustavus Adolphus College

*Kim Mooney*, Provost and Vice President for Academic Affairs, Franklin Pierce University

Mentors:

*Susan Agre-Kippenhan*, Vice President for Academic Affairs and Dean of the Faculty, Linfield College

*Brad Born*, Vice President for Academic Affairs, Bethel College (KS)

*Charlotte Borst*, Vice President for Academic Affairs and Dean of the College, Whittier College

*John M. Burney*, Vice President for Academic Affairs and Dean of the College, Doane College

*Stephanie Fabritius*, Vice President for Academic Affairs and Dean of the College, Centre College

*Karen Kaivola*, Provost and Chief Academic Officer, Augsburg College

*Valerie D. Lehr*, Vice President of the University and Dean of Academic Affairs, St. Lawrence University

*Leanne M. Neilson*, Provost and Vice President for Academic Affairs, California Lutheran University

*Carolyn Newton*, Provost, The College of Wooster

*Christine Pharr*, Vice President for Academic Affairs, College of Saint Mary (NE)

*Marc Roy*, Provost, Goucher College

*Marci Sortor*, Provost and Dean of the College, St. Olaf College

*Alan Woolfolk*, Vice President of Academic Affairs and Dean of the Faculty, Flagler College

4:30 p.m.  
**Workshop for New CAOs Adjourns**
Workshop for CAOs in Their Third or Fourth Year of Service

SATURDAY, NOVEMBER 1

Coordinators:
Kina Mallard, Executive Vice President and Provost, Carson Newman University
Charlie T. McCormick, Provost and Vice President for Academic Affairs, Schreiner University

7:30–8:00 a.m.  Continental Breakfast
Broadway I and II

8:00–8:15 a.m.  Welcome
Christoph Kunkel, Chief of Staff and Vice President for Operations, CIC

8:15–9:00 a.m.  Framing the Day and Introductions
Kina Mallard and Charlie T. McCormick

9:00–10:30 a.m.  Reflecting on the Moment
Charlie T. McCormick

Discussion Facilitators:
Kristine M. Bartanen, Academic Vice President and Dean of the University, University of Puget Sound
David R. Evans, Vice President for Academic Affairs and Dean of the Faculty, Buena Vista University
10:30–10:45 a.m. Break

10:45–11:55 a.m. Soul Care and Discussion with Facilitators
Kina Mallard

Noon–1:15 p.m. Lunch
Broadway III and IV

1:15–1:45 p.m. Envisioning the Future: Strengthening Your Leadership Capital
Broadway I and II
Kina Mallard and Charlie T. McCormick

1:45–2:45 p.m. Case Studies with Facilitators

2:45–3:00 p.m. Break

3:00–4:00 p.m. Critical Issues in Academic Leadership
Panel discussion with facilitators

4:00 p.m. Workshop Adjourns
Saturdays, November 1

7:30–9:00 a.m.  
*Lutheran Colleges and Universities Chief Academic and Chief Financial Officers Meeting*  
Coordinator: *Mark Wilhelm*, Director for Schools, Evangelical Lutheran Church in America

8:00 a.m.–9:00 p.m.  
*Senior Leadership Academy*  
(By invitation only)  
Coordinator: *Thomas R. Kepple, Jr.*, President, American Academic Leadership Institute

9:00 a.m.–3:00 p.m.  
*Mennonite Colleges Chief Academic and Chief Financial Officers Meeting*  
Convener: *Sally Weaver Sommer*, Vice President and Dean of Academic Affairs, Bluffton University

10:00 a.m.–Noon  
*Concordia University System Chief Academic and Chief Financial Officers Meeting*  
Coordinator: *Paul A. Philp*, Director of Institutional Research and Integrity, Concordia University System
Noon–4:00 p.m.  **TIAA-CREF CONSULTATIONS**

(Sign up for all consultations in advance at the TIAA-CREF table or online at www.SignUp4.net/Public/ap.aspx?EID=20144388E.)

**Executive Suite**

**Endowment Management Consultation**

*Michael Collins* of TIAA-CREF Trust Company’s Endowment and Foundation Services will be available for endowment and foundation management consultations with CAOs and CFOs during the Institute.

Boardroom East and Boardroom West

**Planning for Your Retirement: Personal Consultations**

Wealth Management Consultants *Richard Diodosio* and *Joah Yeoman* will be available for appointments on Saturday, November 1, Noon–4:00 p.m., and on the following days:

- Sunday, November 2, 8:00 a.m.–5:00 p.m.
- Monday, November 3, 8:00 a.m.–5:00 p.m.
- Tuesday, November 4, 8:00 a.m.–Noon

2:30–4:30 p.m. **Catholic Colleges and Universities Chief Academic and Chief Financial Officers Meeting**

Coordinators: *Colleen Hegranes*, Senior Vice President, St. Catherine University, and *Mary Ann Gawelek*, Provost and Dean of the Faculty, Seton Hill University

3:00–4:00 p.m. **CAO Mentors Meeting**

3:30–4:00 p.m. **CAO/CFO Task Force Meeting**

4:00–4:30 p.m. **Mentors Meet New CAOs**

All new CAOs registered for the Workshop for New Chief Academic Officers are invited to participate in the Mentor Program, which consists of small groups of new CAOs working with an experienced colleague. Mentors will lead discussions about the issues raised by the new CAOs.

*Mark J. Braun*, Provost and Dean of the College, Gustavus Adolphus College

*Kim Mooney*, Provost and Vice President for Academic Affairs, Franklin Pierce University
CIC gratefully recognizes TIAA-CREF and AALI as premier sponsors of this Institute.

7:30 a.m.–5:00 p.m.  
**Chief Academic and Chief Financial Officers Institute Registration and Idea Exchange**  
Participants are invited to place materials to share with colleagues on display tables.

5:00–6:30 p.m.  
**Opening Plenary Session**  
(*Sponsored by iDesignEDU*)  
Chair: **B. Connie Allen**, Provost, Saint Augustine’s University

**Welcome**  
*Richard Ekman*, President, CIC  
*John D. Walda*, President and Chief Executive Officer, National Association of College and University Business Officers (NACUBO)

**Presentation of Awards**  
*Richard Ekman*

**Awards for Service to the CIC CAO Task Force**  
*B. Connie Allen*, Provost, Saint Augustine’s University  
*John D. Kolander*, Provost, Wisconsin Lutheran College  
*Marlene Moore*, Dean of the College and Vice President for Academic Affairs, Willamette University
2014 CIC Chief Academic Officer Award

Mark J. Braun, provost and dean of the college at Gustavus Adolphus College, is the recipient of the 2014 CIC Chief Academic Officer Award in recognition of his contributions to colleagues at independent colleges and universities. Prior to assuming the CAO role at Gustavus Adolphus, Braun served as senior vice president for academic affairs and dean of the college at Augustana College (SD) from 2007 to 2011. He has made numerous presentations at the Institute for Chief Academic Officers and at the CIC Workshops for Department and Division Chairs on seeing the big budget picture, mission-based budgeting, and faculty reviews. Braun has served as one of the coordinators of the Mentor Program for New CAOs since 2011, helping many of his colleagues as they begin their tenure as CAOs.

Braun holds a doctorate in speech communication from the University of Minnesota and a master’s degree from Minnesota State University, Mankato. Braun is currently a member of the board of the American Conference of Academic Deans, has served on assessment and planning teams for the Association of American Colleges and Universities, has been a member of the board of directors of the Broadcast Education Association, and has been a manuscript reviewer for several publishers in his field. His research interests include technology policy making, gender and mass media organizations, and communication studies pedagogy. His book, AM Stereo and the FCC: Case Study of a Marketplace Shibboleth (1994), is an analysis of federal regulatory decision making involving new technology. In 1994, he received the Outstanding Citizen Award from the city of Mankato for his many contributions to that community.

KEYNOTE ADDRESS
“Conflicting Realities: Bridging the Gap between Digital Natives and Digital Immigrants”

In his keynote address, Arthur Levine will offer his distinctive perspective on the present generation of college students and what they have in common with—and how they differ from—previous generations of students. College students today are digital natives; they have grown up with digital technologies and expect there always to be a “next new thing.” They are constantly connected to a “tribe” of family, friends, and acquaintances through social media, but they shy away from face-to-face communication and often have weak interpersonal skills. Colleges and universities and their faculties and staffs, on the other hand, are digital immigrants; they lag behind students in the adoption of new technologies and struggle to adopt new
teaching and learning methods. How can we prepare students to be the creators of the next phase of the digital revolution? How can we help them develop stronger face-to-face communication and problem-solving skills? How can we acclimate ourselves to the “new normal” of constant change? Levine will offer practical and specific suggestions grounded in his extensive research to help CAOs and CFOs think productively about these challenges and opportunities.

Levine is the sixth president of the Woodrow Wilson National Fellowship Foundation. Before his appointment in 2006, he was president and professor of education at Teachers College, Columbia University. He previously served as chair of the higher education program, chair of the Institute for Educational Management, and senior lecturer at the Harvard Graduate School of Education. Levine also was president of Bradford College (1982–1989). He received his bachelor’s degree from Brandeis University and his PhD from the State University of New York at Buffalo.

Levine’s most recent book is *Generation on a Tightrope: A Portrait of Today’s College Student* (with Diane Dean, 2012). Among his other publications are *Unequal Fortunes: Snapshots from the South Bronx* (with Laura Scheiber, 2010); *When Hope and Fear Collide: A Portrait of Today’s College Student* (with Jeanette S. Cureton, 1998); and *Beating the Odds: How the Poor Get to College* (with Jana Nidiffer, 1995).

A recipient of numerous honors, including Carnegie, Guggenheim, and Rockefeller Fellowships as well as the American Council on Education’s Book of the Year award, Levine is a member of the American Academy of Arts and Sciences and currently serves on the boards of the Educational Testing Service and Say Yes to Education.

### 6:30–7:15 p.m.

**Welcoming Reception** *(Admission by Institute badge)*

*(Sponsored by National Management Resources Corporation)*

All registered Institute participants are invited to gather, connect with old friends, and meet new ones. Participants who wish to bring a guest who is not registered for the Institute may purchase a guest ticket at the CIC Registration Desk.

### 7:15–9:00 p.m.

**Buffet Dinner** *(Admission by Institute badge)*

*Plaza Foyer*

*Pavilion Ballroom*
Sunday, November 2

7:00 a.m.–5:00 p.m.  
**Chief Academic and Chief Financial Officers Institute Registration and Idea Exchange**  
Display area for sharing materials with colleagues

**Dine-around Dinner Sign-up**  
To get to know colleagues from other campuses and exchange ideas over dinner in area restaurants, participants are encouraged to sign up at the CIC Registration Desk to join a “dine-around dinner” group on Sunday evening. Participants are responsible for their own meal expenses. Please sign up by noon so that CIC can make transportation arrangements if needed. Groups will meet in the hotel lobby at 6:15 p.m.

7:15–8:45 a.m.  
**NetVUE Focus Group**  
(By invitation only)

7:30–8:45 a.m.  
**Breakfast Discussions** *(See list of discussion topics in Appendix, page 47.)*  
Breakfast discussions offer informal opportunities for participants with similar interests to share information. Leaders will welcome participants and open the discussion. Participants may move among several of these groups and are invited to share perspectives from their institutions.

8:00–8:30 a.m.  
**Ecumenical Worship Service**  
*Kenneth P. Carson*, Provost, Geneva College  
A listing of churches in the area is included in the Resources and Materials booklet.
8:00 a.m.–Noon  
Senior Leadership Academy  
Skyline I and II  
(By invitation only)

8:00 a.m.–5:00 p.m.  
TIAA-CREF CONSULTATIONS  
(For all consultations in advance at the TIAA-CREF table.)  
Executive Suite  
Endowment Management Consultation  
*Michael Collins* of TIAA-CREF Trust Company’s Endowment and Foundation Services will be available for endowment and foundation management consultations with CAOs and CFOs during the Institute.

Boardroom East and Boardroom West  
Planning for Your Retirement  
Personal consultations with TIAA-CREF Wealth Management Consultants *Richard Diodosio* and *Joah Yeoman* will be available for appointments on the following days:  
- Sunday, November 2, 8:00 a.m.–5:00 p.m.  
- Monday, November 3, 8:00 a.m.–5:00 p.m.  
- Tuesday, November 4, 8:00 a.m.–Noon

8:00 a.m.–5:00 p.m.  
CAO/CFO Spouses and Partners Hospitality Room  
Forum Suite

8:45–9:00 a.m.  
Break

9:00–10:15 a.m.  
PLENARY SESSION  
“Information Technology in Higher Education: What’s Next?”  
*Diana G. Oblinger* is president and CEO of EDUCAUSE, a nonprofit association whose mission is to advance higher education through the use of information technology. In this session, she will discuss the role of information technology in higher education, focusing on the potential for change and the implications for CAOs and CFOs.
of information technology. Previously, Oblinger held positions in academia and business: vice president for information resources and chief information officer of the University of North Carolina system, executive director of higher education at Microsoft, and IBM director of the Institute for Academic Technology. Earlier, she was on the faculty of the University of Missouri-Columbia and Michigan State University and served as associate dean of academic programs at the University of Missouri.

As president of EDUCAUSE, Oblinger created the EDUCAUSE Learning Initiative, known for its leadership in teaching, learning, and technology innovation, as well as several signature products, such as the “7 Things You Should Know About” series. She also initiated EDUCAUSE’s first fully online events and its e-book series, including Game Changers (2012) and Educating the Net Generation (2005). In collaboration with the Bill & Melinda Gates Foundation, Oblinger led the creation of the Next Generation Learning Challenges, a $30 million program focused on improving college readiness and completion through information technologies.

Oblinger has served on a variety of boards, including the American Council on Education, ACT, the national visiting committee for the National Science Foundation’s (NSF) National Science Digital Library project, and the NSF committee on cyberinfrastructure. She is co-author of What Business Wants from Higher Education (2006) and editor of Learning Spaces (2006). Oblinger holds undergraduate and doctoral degrees from Iowa State University and is a member of Phi Beta Kappa, Phi Kappa Phi, and Sigma Xi.

Chair: John D. Kolander, Provost, Wisconsin Lutheran College

10:15–10:30 a.m. Refreshment Break Plaza Foyer

10:30–11:45 a.m. WELCOME COFFEE FOR CAO/CFO SPOUSES AND PARTNERS Forum Suite

Greetings
Richard Ekman, President, CIC
Kathy Whatley, Vice President for Annual Programs, CIC

Introduction of CAO/CFO Spouses and Partners
Sandy Aper, Chief Academic Officer Spouse, Millikin University

Social Media for CAO/CFO Spouses and Partners: Benefits and Challenges
Susan J. Cornman, Chief Academic Officer Spouse, Cedarville University
**CONCURRENT SESSIONS**

*(Sponsored by Campus Labs)*

**Galleria North**

**Adjunct Unionization: Coming Soon to a Campus Near You?**

Adjunct Action is a campaign that brings full- and part-time adjunct faculty members together to form a union for the purposes of bargaining over issues of compensation, benefits, evaluation, institutional support for scholarship and research and participation in institutional governance. Efforts in Boston, Washington, DC, Los Angeles, and Seattle have resulted in adjunct unionization and/or legislation that shapes the relationship between adjuncts and the institutions that employ them. Similar movements are underway in 12 other metropolitan areas. How can colleges and universities address the major concerns of adjunct faculty members in advance of a movement to unionize? How do issues of social justice influence the discussion on campuses? An attorney with experience handling the legal aspects of this issue will lead the session.

*Natasha J. Baker*, Partner, Hirschfeld Kramer LLP

Chair: *Kathleen Light*, Provost, University of the Incarnate Word

**Broadway I and II**

**Balancing the Quantitative and Human Sides of Curriculum Analysis**

Although numbers often don’t tell the whole truth, they usually don’t lie, either. This session will present a method of curriculum analysis that considers prospective student information (external demand), graduation information (internal demand), and cost per student credit hour by program to identify programs that, from a cost-benefit perspective, should receive more funding, that are healthy at current levels of funding, that need to be more efficient, and that may no longer make sense for the institution. Discussion about how quantitative data can be used to achieve a strong, viable array of academic programs will follow the presentation.

*Cheryl Brandsen*, Provost, Calvin College

*Thom Davis*, Vice President for Business and Finance, Averett University

*Michael Williams*, President, Austen Group, A RuffaloCODY Company

Chair: *Helen Whippy*, Provost, Chaminade University of Honolulu

**Broadway III and IV**

**Conflicting Realities: Bridging the Gap between Digital Natives and Digital Immigrants**

Participants will meet informally with Arthur Levine to discuss the ideas offered in his keynote address.

*Arthur Levine*, President, Woodrow Wilson National Fellowship Foundation

Chair: *B. Connie Allen*, Provost, Saint Augustine’s University
Non-Traditional Scholarship and the Tenure and Promotion Process

Non-traditional scholarship, including digital and public scholarship, is becoming mainstream for faculty members at liberal arts colleges and universities. Many faculty members see opportunities in non-traditional scholarship to collaborate seamlessly with colleagues, including students and community members, and to develop innovative teaching methods to enhance student learning. But faculty members also have concerns about how non-traditional scholarship will be evaluated and credited. How are publications in digital journals and other forms of non-traditional scholarship considered in tenure and promotion evaluations? What new forms of scholarship are being created through digital media? The presenters will discuss effective evaluation guidelines and examples of institutional processes.

Kristine M. Bartanen, Academic Vice President and Dean of the University, University of Puget Sound

R. Joseph Dieker, Vice President for Academic Affairs and Dean of the College, Cornell College (IA)

Dale H. Simmons, Vice President for Academic Affairs, Aurora University

Chair: John Ottenhoff, Vice President for Academic Affairs and Dean of Faculty, The College of Idaho

Undergraduate Research Consortia—Great Lakes Colleges Association

The Council on Undergraduate Research recently concluded a project designed to bring together institutional leaders from college and university consortia or state systems to explore ways to cooperate in the provision of deeper, richer undergraduate research opportunities for students. The Great Lakes Colleges Association (GLCA) was selected as one of six groups of institutions for this national project. Representatives of GLCA institutions will discuss the impact of the project on member campuses, lessons learned, and future directions for exploration.

Linda C. DeMeritt, Provost and Dean of the College, Allegheny College

Simon Gray, GLCA Program Officer and Associate Professor of Computer Science, The College of Wooster

Carolyn R. Newton, Provost, The College of Wooster

Charles Stinemetz, Provost, Ohio Wesleyan University

Chair: Wenying Xu, Provost, Jacksonville University (FL)

Free Time for Lunch
Noon–1:25 p.m.

Pavilion Ballroom East

Luncheon and Discussion Groups for Women Chief Academic and Chief Financial Officers

(Pre-registration required. For a complete list of discussion group topics, please see page 50 of the Appendix.)

Coordinators: Christine Bahr, Provost, McKendree University, and Karyn Sproles, Provost and Dean of the Faculty, Marietta College

Remarks: Virginia Wilson, Executive Vice President and Chief Financial Officer, TIAA-CREF

1:30–2:45 p.m.

Broadway I and II

CONCURRENT SESSIONS

“Big History” as General Education

Big History applies a multi-disciplinary approach to history from the Big Bang to the present, weaving studies of the cosmos, Earth, life, and humans together. Faculty members and administrators at Dominican University of California, based on the framework of Big History, developed a common intellectual first-year experience for students that is writing-intensive, develops information literacy, uses active learning techniques, and invites students to explore their own roles in shaping their future. The content of the one-year course sequence provides a foundation for the general education program. Administrators at Dominican will sketch the development of this project and report on results of four years of implementation and evaluation.

Mojgan Behmand, Associate Vice President for Academic Affairs, Dominican University of California

Nicola Pitchford, Vice President for Academic Affairs and Dean of the Faculty, Dominican University of California

Chair: Caroline J. Simon, Provost and Executive Vice President, Whitworth University

Broadway III and IV

College-Owned Housing for Faculty and Staff Members

Some institutions build community by providing college-owned housing for faculty and staff members and their families. Should available college-owned housing be set aside for new faculty and staff members or used as a reward for long-serving employees? What limits on how long a faculty or staff member can live in college-owned housing best serve the college’s objectives? This session will focus on the advantages and challenges of distributing college-owned housing in various ways.

David R. Evans, Vice President for Academic Affairs and Dean of the Faculty, Buena Vista University

Paula Garrett, Vice President for Academic Affairs, Warren Wilson College
Valerie D. Lehr, Vice President of the University and Dean of Academic Affairs, St. Lawrence University

Chair: Hans van der Giessen, Provost and Vice President for Academic Affairs, University of Bridgeport

Enrollment Management

Recruiting, enrolling, and retaining students have become more challenging for many colleges and universities in today’s competitive environment. Expert consultants and refined uses of technology both can be helpful. Indeed, enrollment management tools are available to help institutions target recruitment, evaluate applicants, and improve yield among accepted students—not to mention tracking students as they progress through the curriculum, flagging students who need additional support, and establishing alumni relations after graduation. How are private colleges and universities using the available tools to shape the student body and improve retention and graduation rates? Which aspects of the tools are most effective? How can institutions engage faculty members in this process?

Jayne W. Edge, Vice President for Marketing, Jenzabar

Joanne Passaro, Provost and Vice President for Academic Affairs, Carroll University (WI)

Regina Robinson, Dean of Student Affairs, Cambridge College

Chair: Alan Woolfolk, Vice President for Academic Affairs and Dean of the Faculty, Flagler College

Sustainable, Affordable Models for Campus Internationalization

Campus internationalization must provide ways for students and faculty members to expand their views of the world and experience different cultures. Small but purposeful steps as a part of a campus-wide internationalization strategy can advance a more international vision, ethos, student population, faculty, curricula, and co-curricular programs. How can CIC institutions develop plans for campus internationalization that will make valuable international experiences affordable for students and faculty members and that will be sustainable for years to come? Experienced CAOs will discuss how they have approached cost-effective internationalization.

Richard Ostrander, Provost, Cornerstone University

Marc Roy, Provost, Goucher College

Thimos Zabaropoulos, Provost, American College of Greece

Chair: Malcolm Russell, Vice President for Academic Administration, Union College (NE)
Title IX: Compliance and Best Practices

Title IX concerns of colleges and universities have expanded from equal opportunities for male and female students in intercollegiate athletics to equal educational experiences, including freedom from sexual harassment for both men and women. What are the most effective Title IX educational initiatives? Which aspects of sexual harassment avoidance training work well? What kinds of investigations meet compliance requirements?

Natasha J. Baker, Partner, Hirschfeld Kramer LLP

Chair: Paula McNutt, Senior Vice President for Academic Affairs and Dean of the College, Carroll College (MT)

1:30–2:45 p.m.

CAO/CFO SPOUSES AND PARTNERS SESSION

Welcoming New Faculty Members and Their Spouses

Pamla Hoadley, Chief Academic Officer Spouse, Morningside College

Lynne Moore, Chief Academic Officer Spouse, Chowan University

2:45–3:00 p.m.

Break

3:00–4:15 p.m.

CONCURRENT SESSIONS

Cooperating with Community Colleges: Innovative Strategies for Attracting and Retaining Transfer Students

Many talented students begin their undergraduate careers in community colleges. How can small and mid-sized four-year liberal arts colleges and universities effectively cooperate with community colleges to minimize barriers and maximize support for students through the transfer process? What are policies, processes, and services that help students navigate smoothly to college completion? CAOs at CIC colleges that have been successful in attracting and retaining transfer students and a representative from American Honors, a competitive honors program available at select community colleges across the country, will offer practical advice and innovative strategies.

Charlotte Borst, Vice President for Academic Affairs and Dean of the College, Whittier College

David Finegold, Chief Academic Officer, American Honors

Sonya Stephens, Vice President for Academic Affairs and Dean of Faculty, Mount Holyoke College

Chair: Stephen Stahl, Provost, Baldwin Wallace University
**Crash Course: Crafting a Strategic Internationalization Plan**

There is a renewed charge on many CIC campuses to become internationalized institutions that graduate global citizens who function effectively in an increasingly interconnected world. In this interactive session, a representative of American Councils for International Education (American Councils) and a CAO with successful experience in campus internationalization initiatives will take participants through a step-by-step process for developing an institution’s “strategic internationalization plan” that complements the institution’s strategic plan. The presenters will provide information on the dimensions of internationalization, building internal consensus, and establishing an institution’s internationalization goals.

*Kirsten Brecht Baker*, Chief Marketing Officer, American Councils

*Michael A. McDonald*, Provost, Kalamazoo College

*Marci Sortor*, Provost and Dean of the College, St. Olaf College

*Sandra Wong*, Dean of the College, Colorado College

Chair: *John S. Miller*, Provost and Vice President for Academic Affairs, Pacific University (OR)

**Facilities and Financial Modeling for the Sciences and the Fine and Performing Arts: Flashpoint Issues for the CAO and the CFO**

Academic programs in the sciences and the fine and performing arts frequently attract the attention of both the CAO and CFO because of their high cost per student; intensive faculty involvement; need for expensive equipment, instruments, and maintenance agreements; need for specialized facilities; and safety issues. What principles should guide plans for new facilities for the fine and performing arts and sciences? How can the CAO and the CFO bring together faculty members, students, and staff members, including health and safety officers and maintenance supervisors, in the discussions and reach conclusions that most will support?

*Mary Ann Gawelek*, Provost and Dean of the Faculty, Seton Hill University

*Kenneth M. Macur*, Provost and Dean of the College, Bethany College (KS)

*David P. Myron*, Vice President for Finance and CFO, Seton Hill University

Chair: *Sherry Fraser*, Provost, Concordia College (NY)
Financial Aid Leveraging: Integrated Research Can Increase Enrollment and Net Revenue

Customized market research on prospective college students and their families can reveal perceptions of the value of a college education that lie at the heart of a family’s enrollment decision. Analysis of the data can highlight family price sensitivities and forecast enrollment results for the institution based on desired class size and financial aid distribution. In this session, presenters will explain predictive modeling and the use of behavioral data in enrollment management. The goal of this approach is to leverage financial aid to yield an increase in enrollment and net revenue.

Michele D. Perkins, President, New England College
Daniel A. Wubah, Provost, Washington and Lee University
David R. Wuinee, Senior Vice President, Maguire Associates

Chair: Christine De Vinne, OSU, Vice President for Academic Affairs, Notre Dame of Maryland University

Is It Time for the Next Step? The Presidential Search Process

When is the right time to start thinking about a presidency? How do you know when you are ready for the next challenge? This session will help CAOs and CFOs answer these questions and offer a view inside the sometimes mysterious presidential search process. An experienced search consultant will give practical advice on how to present typical professional achievements in ways that presidential search committees will find relevant and impressive and how to approach search consultants.

Andrea Warren Hamos, Vice President for Consulting Operations and Senior Consultant, Academic Search, Inc.

Chair: Mary Elizabeth Stivers, Provost and Vice President for Academic Affairs, Grand View University

CAO/CFO SPOUSES AND PARTNERS SESSION

Spoken and Unspoken Roles and Expectations of the CAO/CFO Spouse or Partner

Diane T. Aquila, Chief Academic Officer Spouse, University of St. Thomas (TX)
Susan J. Cornman, Chief Academic Officer Spouse, Cedarville University

Refreshment Break

3:00–4:15 p.m.
Forum Suite

4:15–4:30 p.m.
Plaza Foyer
4:30–5:30 p.m.  
**CAO Mentor Program**

Participants in the Workshop for New Chief Academic Officers meet with CAO mentors to discuss key issues and concerns for new CAOs.

*Mark J. Braun*, Provost and Dean of the College, Gustavus Adolphus College  

*Kim Mooney*, Provost and Vice President for Academic Affairs, Franklin Pierce University

4:30–5:30 p.m.  
**CONCURRENT SESSIONS**

**CAO-CFO Partnerships: Models of Good Relationships**

It is essential to the success of a college or university that the CAO and CFO maintain a collaborative working relationship. But these two senior officers often approach issues and opportunities from different perspectives. What are best practices for working together productively? How can each senior officer help the other understand his or her point of view? How can these two colleagues build a relationship that will survive conflict?

*Johnnella E. Butler*, Provost and Vice President for Academic Affairs, Spelman College  

*Thomas Bylsma*, Vice President for Finance and Chief Financial Officer, Hope College  

*Robert Flanigan*, Vice President for Business and Financial Affairs and Treasurer, Spelman College  

*R. Richard Ray*, Provost, Hope College  

Chair: *Scott Sheffield*, Vice President for Academic Affairs and Dean of Faculty, Brevard College

**Higher Education Leadership: The Entrepreneurial CAO-CFO Partnership**

Institutional growth occurs through new programs and new markets. Finding the funds to support new programs and market expansion requires that CAOs and CFOs analyze current program and course offerings, financial aid allocations, retention efforts, and the debt structure of the institution. The CAO and CFO of Becker College, in cooperation with the president, a higher education consultant, and faculty members, are implementing a plan for institutional transformation. The college is currently in a five-stage process that is intended to result in university status by 2020. Accomplishments thus far include improved retention and graduation rates, higher admissions standards, increased student enrollment, discontinuation of remedial courses, and new programs. The panel will present the framework they used to guide the process and lead a case-based discussion.
David Ellis, Senior Vice President and CFO, Becker College

John MacDonald, Vice President of Innovation and Interim CAO, Becker College

Heather McGowan, Consultant

Edward Sirianno, President, Creative Communications Associates

Chair: Kerry D. Fulcher, Provost and Chief Academic Officer, Point Loma Nazarene University

Broadway I and II

Historical Overview of the Pacific Northwest

(Joint session with spouses and partners)

The Pacific Northwest is a region rich in history. This session will touch on major themes and topics including the roles of Native Americans, exploration, the fur trade, the establishment of missions, overland immigration, and the emergence of key industries. Often overlooked is the important role of the federal government in this region. Portland is the regional headquarters for the Forest Service, Bureau of Land Management, Bureau of Indian Affairs, Fish and Wildlife Service, and Corps of Engineers. The Pacific Northwest also has been a trend-setter through political reform and social legislation such as open access to all ocean beaches and the ban on aerosol sprays. An expert historian will lead participants on a tour de force of the rich history of the region.

Stephen Dow Beckham, Professor of History Emeritus, Lewis & Clark College

Chair: Jane Monnig Atkinson, Vice President and Provost, Lewis & Clark College

Galleria North

Securing America’s Future: The Power of Liberal Arts Education

CIC’s public information campaign has progressed on numerous fronts this year. Following a quick update, CAOs and CFOs can learn of specific ways that they and others at their institutions can become more actively involved in campaign activities that disseminate key messages about the liberal arts and independent higher education to the public, prospective students, journalists, and policy makers. The campaign has changed the public discourse for the better, but more remains to be done. Examples of how a few colleges have used campaign materials and digital platforms to their advantage will be explored.

S. Georgia Nugent, Senior Fellow, CIC, and President Emerita, Kenyon College

Chair: Hadi Salavitabar, Provost and Vice President for Academic Affairs, The College of Saint Rose
Surviving Presidential Transitions
(Open only to currently serving CAOs and CFOs)

Presidential transitions at colleges and universities are times of both challenge and opportunity. Most campus constituencies are wondering: Which institutional values and traditions will remain constant, and which programs and processes will change? How can the CAO and CFO best adapt to changing priorities and new relationships among campus leaders? What can be done before, during, and after the transition to improve communication and build a strong working relationship with the new leader? Panelists will share their observations about presidential transitions.

John Beckford, Vice President for Academic Affairs and Dean, Furman University

Robert D. Haak, Vice President and Dean of the College, Hiram College

Elizabeth Tobin, Vice President for Academic Affairs and Dean of the College, Illinois College

Chair: Allen Bedford, Dean of Academics and Faculty, Bryn Athyn College

5:30–6:15 p.m.

CIC Executive Leadership Academy and Senior Leadership Academy Alumni Reception

Alumni of CIC’s Executive Leadership Academy and Senior Leadership Academy are invited to gather for light refreshments and conversation.

Convener: Thomas R. Kepple, Jr., President, American Academic Leadership Institute

6:00–8:30 p.m.

Council for Christian Colleges & Universities Chief Academic Officers Commission Meeting

Coordinator: Kenneth Bussema, Consultant for Research and Special Projects, Council for Christian Colleges & Universities

6:15 p.m.

Dine-around Dinners

(Meet in hotel lobby.)

CIC has arranged informal dinners at a variety of restaurants in Portland to provide participants with opportunities to meet colleagues from other campuses and to exchange ideas. Please sign up by noon on Sunday at the CIC Registration Desk. Individuals pay for their own dinner. Transportation, if needed, is provided by CIC.
Monday, November 3

7:00 a.m.–5:00 p.m.  
**Chief Academic and Chief Financial Officers Institute Registration and Idea Exchange**  
*Plaza Foyer*  
Participants are invited to place materials to share with colleagues on display tables.

7:30 a.m.–5:00 p.m.  
**CAO/CFO Spouses and Partners Hospitality Room**  
*Forum Suite*

7:30–8:30 a.m.  
**Annapolis Group Chief Academic and Chief Financial Officers Breakfast**  
*Skyline III*  
Members of the Annapolis Group will meet for informal discussion of current issues.  
Convener: *Jonathan D. Green*, Provost and Dean of the Faculty, Illinois Wesleyan University

7:30–8:30 a.m.  
**Association of Colleges of Sisters of Saint Joseph Chief Academic and Chief Financial Officers**  
*Pavilion Ballroom*  
Members of the Association of Colleges of Sisters of Saint Joseph will meet for breakfast and discussion.  
Coordinator: *Colleen Hegranes*, Senior Vice President, St. Catherine University
7:30–8:30 a.m. **Breakfast Discussions** *(See list of discussion topics in Appendix, page 51.)*  
*Pavilion Ballroom*  
(Sponsored by Registry for College and University Presidents)  
Breakfast discussions offer informal opportunities for participants with similar interests to share information. Leaders will welcome participants and open the discussion. Participants may move among several of these groups and are invited to share perspectives from their institutions.

7:30–8:30 a.m. **CAO/CFO SPOUSES AND PARTNERS BREAKFAST DISCUSSION**  
*Forum Suite*  
*Why We Read What We Read: Selections from My Bookshelf*  
*Lisa Sheffield*, CAO Spouse, Brevard College

8:00 a.m.–5:00 p.m. **TIAA-CREF CONSULTATIONS**  
*(Sign up for all consultations in advance at the TIAA-CREF table.)*  
*Executive Suite*  
Endowment Management Consultation  
*Michael Collins* of TIAA-CREF Trust Company’s Endowment and Foundation Services will be available for endowment and foundation management consultations with CAOs and CFOs during the Institute.

8:45–10:00 a.m. **PLENARY SESSION**  
*Grand Ballroom*  
“In College Choice, Access, and Success for Low-Income, High-Achieving Students”  
In her work with the Expanding College Opportunities Project, *Caroline M. Hoxby* has worked extensively on the subject of how low-income, high-achieving students select colleges and how to help them make choices that are better both for them and for the colleges they attend. Hoxby will discuss her research findings and give practical advice on how to attract these students and support them through graduation. She also will describe the impact of low-income, high-achieving students’ enrollment on financial aid in particular and institutional budgets in general.
Hoxby is Scott and Donya Bommer Professor of Economics at Stanford University, director of the Economics of Education Program at the National Bureau of Economic Research, and senior fellow of the Hoover Institution and the Stanford Institute for Economic Policy Research. Before moving to Stanford, she was Fried Professor of Economics at Harvard University. Hoxby has been a presidential appointee to the National Board of Education Sciences and currently serves on advisory committees for the federal government, top policy think tanks, and foundations with interests in education.

A public and labor economist, Hoxby is one of the world’s leading scholars in the economics of education and is well known for promoting scientific methods in education research. She is the principal investigator of the Expanding College Opportunities Project, which has had dramatic effects on low-income, high achievers’ college attendance rate. Other research interests include explaining the rising cost of higher education, the effects of school choice and charter schools on student achievement, and the effects of teacher unionization. Hoxby also writes on public school finance, peer effects, and how education affects economic growth.


Hoxby holds a PhD from MIT, studied at Oxford University as a Rhodes Scholar, and obtained her baccalaureate degree from Harvard University.

Chair: Marlene Moore, Dean of the College and Vice President for Academic Affairs, Willamette University

10:00–10:15 a.m. Refreshment Break

Plaza Foyer

10:15–11:15 a.m. CONCURRENT SESSIONS

Artful Collaborations: The Creative Campus

Collaborations among the fine and performing arts, other disciplines, and the co-curriculum can involve students in high-impact, engaged learning. The Association of Performing Arts Presenters (APAP) Creative Campus Innovations program explored the connection between higher education and the arts and demonstrated the significant contributions the fine and performing arts can make to campus life, student engagement, deep learning, and innovation. Collaborations with guest artists and presenters can drive innovation, create an environment that supports risk taking,
and help prepare students for employment that demands creative skills. Representatives from APAP and from campuses that have engaged the arts across the institution will present examples of how these initiatives energized faculty members and students and developed a distinctive campus identity.

Brian Jose, Executive Director, Fine Arts Programming, College of Saint Benedict/Saint John's University

Karen Kaivola, Provost and Chief Academic Officer, Augsburg College

Rita E. Knuesel, Provost, College of Saint Benedict/Saint John's University

Scott D. Stoner, Director, Programs and Resources, APAP

Chair: Michael Selmon, Provost and Vice President for Academic Affairs, Alma College

Parlors B and C

College Choice, Access, and Success for Low-Income, High-Achieving Students

Participants will meet informally with Caroline Hoxby to discuss ideas offered in her plenary address.

Caroline M. Hoxby, Scott and Donya Bommer Professor of Economics, Stanford University

Chair: Marlene Moore, Dean of the College and Vice President for Academic Affairs, Willamette University

Broadway III and IV

Effective Endowment Management Practices

College and university endowments have faced both opportunities and challenges in recent years. How can endowments successfully weather volatile times? What are effective ways of working with the board of trustees on endowment issues? What are the pros and cons of partnering with endowment consultants or fully outsourced endowment managers? TIAA-CREF endowment specialists will join a CAO and CFO to lead an interactive discussion.

Bruce Arick, Vice President for Finance and Administration and Assistant Treasurer, Butler University

Michael Collins, Director, Endowments and Foundations, TIAA-CREF

Kathryn A. Morris, Provost and Vice President for Academic Affairs, Butler University

Kevin J. O’Leary, Managing Director, Individual Advisory Services and Trust Company, Fiduciary Services Business, TIAA-CREF

Chair: Tracy Stewart, Academic Dean, Alaska Pacific University
Hiring and Evaluation Part I: Best Practices for Hiring

Current social and economic trends require chief academic officers and chief financial officers to think more carefully about the legal risks campuses face when conducting searches for faculty and staff positions. An experienced higher-education attorney will discuss best hiring practices in drafting the position description, appointing and training the search committee, building the pool of applicants, checking references, completing background checks, and interviewing candidates.

Kathleen Rinehart, General Counsel, Saint Xavier University

Chair: Gail Summer, Vice President for Academic Affairs, Ferrum College

The Affordable Care Act: What It Means for the Institution, Adjunct Faculty, and Students

The Affordable Care Act (ACA) is affecting how colleges and universities structure the workload and benefits for adjunct faculty members and graduate students and manage health care for undergraduates. An expert on ACA will define the most critical areas of campus impact and lead a panel of senior officers in a discussion of potential solutions to the challenges.

Brett Bradfield, Provost and Vice President for Academic Affairs, University of Sioux Falls

Tracy Espy, Provost and Vice President for Academic Affairs, Pfeiffer University

Jeff Plyler, Chief Financial Officer, Pfeiffer University

Allen T. Steinberg, Attorney, Law Offices of Allen T. Steinberg, P.C.

Chair: Nancy Krippel, Provost and Vice President for Academic Affairs, Brenau University

10:15–11:15 a.m.
Forum Suite

CAO/CFO SPOUSES AND PARTNERS SESSION

Book Discussion: Crossing to Safety by Wallace Stegner

James Collins, Chief Academic Officer Spouse, Molloy College

Ursula C. McCarty, Chief Academic Officer Spouse, Buena Vista University

11:15–11:30 a.m.
Plaza Foyer

Refreshment Break
CONCURRENT SESSIONS

First Year Undergraduate Enrollment: Fall 2014 Results and Analysis

For the second consecutive year the *Chronicle of Higher Education*, in cooperation with CIC, surveyed CIC institutions to collect information about fall enrollment. Information collected included progress toward first-year student enrollment and net-tuition revenue goals, financial aid awarded, discount rates, international enrollments, and strategies that were used to handle enrollment excess and shortfall. Scott Carlson of the *Chronicle* will present the survey results and lead a discussion with a panel of experienced CAOs.

*Michael Brown*, Provost and Senior Vice President for Academic Affairs, North Carolina Wesleyan College

*Scott Carlson*, Senior Writer, *Chronicle of Higher Education*

*Patricia Draves*, Vice President for Academic Affairs and Dean of the University, University of Mount Union

*Jane M. Wood*, Vice President for Academic Affairs and Dean of the College, Westminster College (PA)

Chair: *Chad Berry*, Academic Vice President and Dean of the Faculty, Berea College

Hiring and Evaluation Part II: Best Practices for Performance Evaluation

Current social and economic challenges require CAOs and CFOs to think carefully about the legal risks campuses face when evaluating the performance of faculty and staff members, especially when dealing with unacceptable behavior or poor performance and the possible termination of employees. An experienced higher-education attorney will share best practices and tools that can help administrators manage meaningful evaluations while minimizing risk to the institution and themselves.

*Kathleen Rinehart*, General Counsel, Saint Xavier University

Chair: *Jenifer Ward*, Provost and Dean of the College, Centenary College of Louisiana

Open Mike for Chief Academic and Chief Financial Officers

*(Open only to currently serving CAOs and CFOs)*

CAOs and CFOs have the opportunity to seek advice from colleagues on specific issues and to share information about broader trends and practices.

Moderators: *B. Connie Allen*, Provost, Saint Augustine's University, and *Chris McAlary*, Vice President for Administration and Finance, Mount St. Mary’s College (CA)
Broadway I and II

Preventing Students for National and International Fellowship and Scholarship Opportunities

Students typically have heard of the Rhodes Scholarship and the Fulbright Program, but many other opportunities for advanced or graduate study are available for college students in their senior year or immediately following graduation. How can students find out about national and international fellowships and scholarships that match their interests? What types of programming encourage students to plan and prepare successful applications for these programs? How early in their academic career should these activities begin? How can colleges and universities encourage faculty advisors to become more involved in preparing students for scholarship and fellowship competitions? CAOs from campuses that prepare students to apply for post-graduation support and a representative of one international program will lead the discussion.

David G. Brailow, Vice President for Academic Affairs and Dean of the College, Franklin College

Stephen Gibson, Director of Programs, CIC, and Manager, Davies-Jackson Scholarship Program

Jonathan D. Green, Provost and Dean of the Faculty, Illinois Wesleyan University

Chair: Bryan Le Beau, Provost and Vice President for Academic Affairs, University of Saint Mary (KS)

Broadway III and IV

Where Have I Landed? Transitions between Institutions of Different Types

Moving from faculty or staff positions into administrative leadership roles often means moving to a new campus. Making the transition to a similar institution is already a challenge; there are new people, new processes, and new traditions to understand. Moving to a different type of institution—larger or smaller, public or private, elite or non-elite, single-gender or coed—can be a shock. What do CAOs and CFOs need to know before making a transition to an institution of a different type? How can the new leader avoid making decisions based on the culture and values of the former campus? Senior officers who have made successful major transitions will reflect on their experiences and offer advice to others.

Michael Frandsen, Vice President for Finance and Administration, Oberlin College

Elizabeth Paul, Provost and Vice President for Academic Affairs, Stetson University

Glenn Sharfman, Provost, Oglethorpe University

Jeanine Silveira Stewart, Provost and Dean of the Faculty, McDaniel College

Chair: Jeffrey Aper, Provost, Millikin University
<table>
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<tr>
<th>Time</th>
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<tr>
<td>11:30 a.m.–12:30 p.m.</td>
<td><strong>CAO/CFO SPOUSES AND PARTNERS SESSION</strong>  &lt;br&gt;Forum Suite  &lt;br&gt;Communication and Relationships with Board of Trustees Spouses and Partners  &lt;br&gt;<em>Diane T. Aquila</em>, Chief Academic Officer Spouse, University of St. Thomas (TX)  &lt;br&gt;<em>Emily Johnson</em>, Chief Academic Officer Spouse, Hastings College</td>
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<tr>
<td>12:30–1:50 p.m.</td>
<td><strong>Free Time for Lunch</strong></td>
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<td>12:30–1:50 p.m.</td>
<td><strong>Conference for Mercy Higher Education Chief Academic and Chief Financial Officers Luncheon</strong>  &lt;br&gt;Coordinator: <em>Frank Scully, Jr.</em>, Vice President for Academic Affairs, Gwynedd Mercy University</td>
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<td>12:30–1:50 p.m.</td>
<td><strong>Missouri Chief Academic and Chief Financial Officers Luncheon</strong>  &lt;br&gt;(Meet in hotel lobby.)  &lt;br&gt;Coordinator: <em>Terry Smith</em>, Executive Vice President and Dean of Academic Affairs, Columbia College (MO)</td>
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<td>1:30–5:00 p.m.</td>
<td><strong>Oregon Alliance of Independent Colleges &amp; Universities Chief Academic and Chief Financial Officers Luncheon</strong>  &lt;br&gt;Coordinators: <em>Larry D. Large</em>, President, and <em>Brent Wilder</em>, Vice President, Oregon Alliance of Independent Colleges &amp; Universities</td>
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<tr>
<td>1:30–5:00 p.m.</td>
<td><strong>Women’s College Coalition Luncheon for Chief Academic Officers</strong>  &lt;br&gt;Coordinator: <em>Marilyn Hammond</em>, Interim President, Women’s College Coalition</td>
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| 1:30–5:00 p.m. | **Optional Excursion**  <br>Portland Sightseeing Tour  <br>(Pre-registration required)**
CONCURRENT SESSION

Reforming and Extending the Traditional Transcript: Toward a Postsecondary Achievement Report (PAR)

With the growth of new options for acquiring knowledge and skills, the conventional transcript—which documents only a fraction of the educational impact of a postsecondary education—needs to be reconsidered. How can institutions document and certify other types of achievements (such as competency-based skills and co-curricular activities)? The session will explore how the concept of PAR, a digital, extended transcript modeled after the United Kingdom’s Higher Education Achievement Report, can link experiences to present a more complete picture of the skills and knowledge students have achieved. Participants will learn about innovations and cost efficiencies through PAR’s use.

David L. Jamison, Provost and Senior Vice President for Academic Affairs, Robert Morris University

Patricia A. Lynott, Provost and Senior Vice President for Academic Affairs, Southern New Hampshire University

Matthew Pittinsky, Chief Executive Officer, Parchment

Chair: Stephen Coleman, Vice President for Academic Affairs and Dean of Faculty, Elmira College

WORKSHOPS

Faculty Workload and Compensation

(Pre-registration required. Inquire at the CIC Registration Desk.)

Faculty workload is a complex issue. The conventions, traditions, and methods of calculation vary from campus to campus. This workshop will provide an introduction to the ways faculty workload can be measured, distributed, evaluated, and rewarded, as well as the factors that should influence these decisions. Workload assignments to be covered include serving as department chair or in other faculty governance roles, teaching laboratories or music lessons, advising student organizations, supervising independent studies and internships, developing online courses, and more. CAOs and CFOs are welcome.

Kenneth P. Carson, Provost, Geneva College

Tracy S. Parkinson, Provost, Coker College

Chair: Donna McDaniel, Vice President for Academic Affairs, Bellevue University
**Integrated Planning, Resource Allocation, and Assessment**

*(Pre-registration required. Inquire at the CIC Registration Desk.)*

This workshop will provide CAOs and CFOs with opportunities to learn about a method of integrated planning for new and continuing academic programs, including the allocation of resources to those programs and the assessment of the effectiveness of the programs in meeting the college or university's learning outcomes. The initial presentation will be followed by an exercise in which participants assess how they might apply what they have learned on their campus. Topics to be discussed include planning to fund facilities for the sciences and fine arts, discontinuing programs, and finding funding for new programs.

*Larry Goldstein*, President, Campus Strategies, LLC

Chair: *Donna Aronson*, Vice President for Academic Affairs, Saint Mary's University of Minnesota

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**Sophomore to Junior Year Retention**

*(Pre-registration required. Inquire at the CIC Registration Desk.)*

The significant number of rising juniors who transfer to other institutions is a disturbing recent development on many campuses. CAOs and CFOs will gain a deeper understanding from this workshop of the issues considered by sophomores as they decide whether to remain at the same college for their last two years. Why do students transfer at this point? What types of intervention are most effective in preventing students from transferring? How can senior administrators work together to support students in this transition year?

*Laurie A. Schreiner*, Professor and Chair, Doctoral Programs in Higher Education, Azusa Pacific University

Chair: *Yolanda Page*, Vice President for Academic Affairs, Dillard University

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**Strategic Uses of Information Technology**

*(Pre-registration required. Inquire at the CIC Registration Desk.)*

Information technology can enhance an institution's brand, reduce costs, increase risk, and be a vital part of the institutional infrastructure. This workshop will help senior leaders develop a better understanding of the strategic uses of information technology, including “state of the art” and emerging approaches to blended and online teaching and learning, targeted student recruitment, and tracking of assessment and other data. CAOs and CFOs will explore how to deal with issues such as technological competitiveness, campus productivity, and the quality of the learning environment.
Diana G. Oblinger, CEO and President, EDUCAUSE

Chair: Dominic Aquila, Provost and Vice President for Academic Affairs, University of St. Thomas (TX)

6:00 p.m. Free Time for Dinner

MEETINGS OF ASSOCIATED ORGANIZATIONS

6:00 p.m. Association of Presbyterian Colleges and Universities
       Chief Academic and Chief Financial Officers
       (Meet at restaurant.)
       Coordinator: Gary Lubr, Executive Director, Association of Presbyterian Colleges and Universities

Skyline II

Council for Christian Colleges & Universities Chief Academic Officers

Coordinator: Kenneth Bussema, Consultant for Research and Special Projects, Council for Christian Colleges & Universities

6:30 p.m. American Benedictine Colleges Chief Academic and Chief Financial Officers
       (Meet in hotel lobby.)
       Coordinator: Diane Fladeland, Vice President for Academic Affairs, University of Mary (ND)

American Benedictine Colleges Chief Academic and Chief Financial Officers

(Meet in hotel lobby.) Association of Dominican Colleges and Universities Chief Academic and Chief Financial Officers

Coordinator: Thomas Nowak, Academic Dean and Vice President for Academic Affairs, Dominican College (NY)

Skyline III

General Board of Higher Education and Ministry, United Methodist Church Chief Academic and Chief Financial Officers

Coordinator: Melanie B. Overton, Assistant General Secretary, Division of Higher Education, General Board of Higher Education and Ministry, United Methodist Church
Tuesday, November 4

7:00 a.m.–Noon  
**Plaza Foyer**  
**Chief Academic and Chief Financial Officers Institute Registration and Idea Exchange**  
Participants are invited to place materials to share with colleagues on display tables.

7:30–8:45 a.m.  
**Pavilion Ballroom**  
**Breakfast**  
Breakfast will be provided to all Institute participants.

**Pavilion Ballroom**  
**CAO/CFO Spouses and Partners Breakfast**  
CAO/CFO spouses and partners will meet for informal discussions.

**Pavilion Ballroom**  
**Historically Black Colleges and Universities Breakfast for Chief Academic and Chief Financial Officers**  
Chief academic and chief financial officers from HBCUs will meet for informal discussion.

Convener: *Elfred Anthony Pinkard*, Executive Vice President and Chief Operating Officer, Johnson C. Smith University

**Pavilion Ballroom**  
**Yes We Must Coalition Breakfast for Chief Academic and Chief Financial Officers**  
Coalition member CAOs and CFOs will meet for breakfast and discussion. Individuals interested in learning more about the Yes We Must Coalition are welcome.

Moderator: *Christine Pharr*, Vice President for Academic Affairs, College of Saint Mary (NE)
8:00 a.m.–Noon  TIAA-CREF CONSULTATIONS

(Sign up for all consultations in advance at the TIAA-CREF table.)

Executive Suite  Endowment Management Consultation

Michael Collins of TIAA-CREF Trust Company’s Endowment and Foundation Services will be available for endowment and foundation management consultations with CAOs and CFOs during the Institute.

Boardroom East and Boardroom West  Planning for Your Retirement

Wealth Management Consultants Richard Diodosio and Joah Yeoman will be available to schedule appointments.

8:45–9:00 a.m.  Break

8:45 a.m.–Noon  CAO/CFO Spouses and Partners Hospitality Room

9:00–10:15 a.m.  CONCURRENT SESSIONS

Adjunct Faculty: Issues of Support and Fair Treatment

Many colleges and universities have relied on larger numbers of part-time temporary faculty members in recent years to help deal with enrollment fluctuations, changes in student enrollment patterns, and institutional financial stress. As these contingent faculty members prepare to engage students in the classroom, what can be done to welcome them into the campus community, treat them as valuable resources, and provide them with the tools they need to be effective in their interactions with students? CAOs and CFOs will lead a discussion of supportive services and opportunities for adjunct faculty.

David Dauwalder, Executive Vice President and Provost, Woodbury University

Kenneth J. Jones, Vice President for Finance and Administration, Woodbury University

Mark D. Ward, Vice President for Academic Affairs and Dean of the College, University of Dubuque

Chair: Karen S. McIntyre, Senior Vice President for Academic and Student Affairs, Point Park University
**Athletics: Finances and Supervision**

Participation in athletics is an important part of the student life experience for many undergraduates. There are almost as many variations in the reporting structure and financing of athletics as there are institutions. What reporting structures effectively integrate athletics with other student activities for a complete co-curriculum? What structures tightly integrate athletics and academics? How are athletic activities supported financially? Do they contribute to the institution’s revenue stream, break even, or produce a drain on the budget? Panelists will present examples of reporting structures and athletic financing and discuss positive features and potential pitfalls.

*Thomas Cornman*, Academic Vice President, Cedarville University

*Paul T. Davies*, Vice President for Administration and Finance, Randolph-Macon College

*William C. Deeds*, Provost, Morningside College

*William Franz*, Provost, Randolph-Macon College

Chair: *Susan S. Hasseler*, Senior Vice President for Academic Affairs and Dean of the College, Augustana College (SD)

**Competency-Based Education**

Competency-based education is rooted in credit given for experience, proficiency, and documented capabilities. Some forms of competency-based education have been in place at liberal arts colleges for years—placement tests, challenge exams, internships, and project-based learning experiences. But a curriculum built on rigorous demonstrations of competencies recently has developed into a new model for higher education focused on student learning rather than classroom “seat time.” How are such models constructed? Are there particular advantages or disadvantages for certain types of students, campuses, and curricula? How is the quality of the educational experience assessed? CAOs from institutions that have adopted some competency-based education practices and a consultant expert will frame and guide the discussion.

*Scott Campbell*, Vice President, Higher Education, Council for Adult & Experiential Learning

*Patricia A. Lynott*, Provost and Senior Vice President for Academic Affairs, Southern New Hampshire University

*Kathleen O’Brien*, Senior Vice President for Academic Affairs, Alverno College

Chair: *Jasper Lesage*, Provost, Northwestern College (IA)
Retirement Transitions for Faculty Members

Retirement is a highly personal subject for faculty members, and it is fraught with concerns about change, loss of professional identity, loss of personal and professional networks, and fear of being forgotten. How can institutions develop a culture in which retirement is seen as a normal transition? What policies and programs can help ease the transition to retirement or make it more attractive? In what ways can retired faculty members continue to engage productively with the campus?

Laura Bebling, Dean of the College, Knox College
Andrea E. Chapdelaine, Provost and Vice President for Academic Affairs, Albright College
David Trainor, President, Emeriti Retirement Health Solutions
Chair: Perry Rettig, Vice President for Academic Affairs, Piedmont College

Strategies to Increase the Marketability of Academic Programs

Every college or university has distinctive programs of study and co-curricular opportunities for students. What are effective ways to inform prospective students about these programs and attract students who would be a good fit for the institution? How can institutions differentiate themselves from their competitors, attract more students, and increase revenue? Proven strategies to be discussed include conducting an academic program marketability audit, establishing a center of excellence program, repositioning the honors program, and setting tuition at an appropriate level.

Linda Samek, Provost, George Fox University
Robert A. Sevier, Senior Vice President, Strategy, STAMATS, Inc.
Chair: Edward E. Ericson, Vice President for Academic Affairs, John Brown University

CAO/CFO SPOUSES AND PARTNERS SESSION

Brainstorming Session

Participants will engage in brainstorming for the 2015 Spouses and Partners Program at the Institute for Chief Academic and Chief Advancement Officers in Baltimore, Maryland.

Convener: Sandy Aper, Chief Academic Officer Spouse, Millikin University

Refreshment Break
CLOSING PLENARY SESSION

“Tuition: Discounting, Resetting, and Planning”

Much has been written in recent years about how colleges and universities need to adapt to the current economic and social climate. Concerns about high tuition are central to those discussions. How can campus leaders put tuition levels in proper perspective for students and their families? What strategies are effective for maintaining affordability and continuing to provide the resources necessary for an excellent college experience? How does the relationship between tuition and institutional financial aid affect the perception of price for students and families? A lively panel discussion on tuition discounting, resetting, and planning will include the president of NACUBO and three CIC member presidents who have implemented different strategies in pursuit of the goal of controlling costs and tuition levels.

Donald J. Farish has been president of Roger Williams University since 2011. Previously he served for 13 years as president of Rowan University in New Jersey. At Roger Williams, Farish launched the Affordable Excellence initiative, which has positioned the university at the leading edge of the national dialogue regarding cost, debt, and job-preparedness for today's college graduates. Through his president’s blog and other community outreach efforts, Farish has become an advocate for changes to make higher education more affordable. In 2013, he was selected to lead the executive board of Rhode Island Campus Compact. He also serves on the governing boards of the New England Council and the Rhode Island Public Expenditure Council, among other organizations.

Farish received his bachelor’s degree in zoology from the University of British Columbia. He holds a master of science degree in entomology from North Carolina State University, a PhD in biology from Harvard University, and a law degree from the University of Missouri.

Elizabeth A. Fleming became the ninth president of Converse College in 2005, after having served in administrative positions at the Frick Collection in New York, the J. Paul Getty Trust in Los Angeles, Yale University Art Gallery, Victoria and Albert Museum in London, and the Metropolitan Museum of Art. Prior to her arrival at Converse, she was executive director of the Gibbes Museum of Art in Charleston.

Fleming led the Converse College initiative to reset tuition for fall 2014 at 43 percent below the level for fall 2013 to emphasize Converse’s affordability and transparency of financial aid practices. The reduced tuition was accompanied by a reduction in tuition discounting. The college still
offers institutional financial aid but only to the extent covered by endowed scholarship funds.

Fleming currently serves on the boards of the Women’s College Coalition, the National Association of Independent Colleges and Universities, and the ETV Endowment of South Carolina. She is the current president of NCAA Division II Conference Carolinas and vice chair of South Carolina Independent Colleges and Universities.

Fleming graduated magna cum laude from Harvard University and received an MA from the Royal College of Art in London. She holds a PhD in the history of art from Yale University.

John M. McCardell, Jr., president of Middlebury College from 1992 to 2004, has served since 2010 as vice-chancellor and president of Sewanee: The University of the South. He is a distinguished historian and respected national leader in liberal arts education and in student life.

In 2011, Sewanee reduced its total cost of attendance for students by 10 percent. The university continues to modify its pricing model to help families become more comfortable with the cost of college. For example, Sewanee set four-year costs for incoming students so they and their parents know what they will need to pay to complete a degree. The university has seen an increase in both enrollment and retention.

McCardell is the author of The Idea of a Southern Nation (1981), developed from his PhD dissertation. His specialty is U.S. history with emphasis on the 19th-century Old South and on American historiography. He is a member of Phi Beta Kappa and Omicron Delta Kappa and has been honored with grants and fellowships from the American Philosophical Society, National Endowment for the Humanities, and Institute for Southern Studies. He is a graduate of Washington and Lee University and did graduate work at Johns Hopkins University and at Harvard University, where he earned his PhD in history.

John D. Walda assumed the presidency of NACUBO in 2006, following a career in both public policy and law that spanned three decades. He served as president of Indiana University’s board of trustees for eight years, as chair of the Indiana Lottery Commission, as a director and chair of the Association of Governing Boards, and as chair of the board of Clarian Health Partners (now Indiana University Health), which owns and operates the Indiana University hospitals. Walda has been the chair of the Washington Higher Education Secretariat (2009–2011) and a director of the American Council on Education (2008–2011). He is a trustee of Carroll College and Stetson University and serves on the board of directors.
of the Indiana University Foundation and the Yellowstone Park Foundation.

Before leading NACUBO, Walda was a partner in the Bose McKinney & Evans law firm and senior vice president for federal relations for BoseTreacy Associates LLC. He received his BA and JD from Indiana University.

Chair: John D. Walda, President and Chief Executive Officer, NACUBO

Noon

INSTITUTE ADJOURNS

Post-Institute Events

12:15–2:30 p.m. CAO/CFO Task Force Meeting

Studio Suite

12:15–5:00 p.m. Wesleyan Holiness Consortium Chief Academic Officers

Cabinet Suite

Consortium Coordinator: Kevin W. Mannoia, Chair and Founder, Wesleyan Holiness Consortium

1:30–5:30 p.m. Optional Excursion

(Meet in hotel lobby.) Multnomah Falls and Gorge Waterfalls

(Pre-registration required)
Appendix

Sunday, November 2 • Breakfast Discussion Topics

Breakfast discussions offer informal opportunities for participants with similar interests to share information. Leaders will welcome participants and open the discussion. Participants may move among several of these groups and are invited to share perspectives from their institutions.

AGB/NACUBO Looking Under the Hood Institutional Aid Metrics Project
With funding from the Robert W. Woodruff Foundation, NACUBO and the Association of Governing Boards of Universities and Colleges launched the Looking Under the Hood Institutional Aid Metrics Project in 2012. The project aims to develop a set of institutional grant aid metrics that can be used by higher education CFOs, presidents, and board members to examine their current institutional grant aid allocation policies and decisions. Participants will learn about the metrics and discuss how they can help campuses improve planning for institutional aid.

Maryann J. Terrana, Director, Constituent Programs, NACUBO

Best Practices for Campus Communication about the Budget Process
How can colleges and universities demystify the annual budget process for their stakeholders? CAOs and CFOs are invited to discuss communication practices that have been successful on their campuses.

Wayne Powel, Provost, Saint Francis University (PA)

Campus Sustainability Programs
CAOs and CFOs are invited to discuss their campus initiatives to promote campus sustainability. How can such programs enhance student engagement and equip students with skills for global and civic responsibility? How can the programs be designed to ensure good stewardship of both environmental and institutional resources?

Caroline J. Simon, Provost and Executive Vice President, Whitworth University

CAO-CFO Collaboration on Financial Modeling
What are the challenges to building and updating a financial model that sets specific targets to achieve institutional goals? Bryn Athyn College’s CAO-CFO team will facilitate a discussion of the financial model they developed collaboratively and its applicability for other small colleges that are experiencing changes in enrollment, retention, new programs, and facilities.

Daniel T. Allen, Chief Financial Officer, Bryn Athyn College

Allen J. Bedford, Dean of Academics and Faculty, Bryn Athyn College

Cost Analysis Models for Academic Majors
Rockford University’s CAO has developed a profit margin analysis model for academic majors that balances tuition and fees with operating and service expenses. Participants are invited to discuss a sample analysis and to share how their institutions compute the income and
cost of individual majors on their campuses.

Steven F. Siconolfi, Provost and Vice President for Academic Affairs, Rockford University

Creating a Campus “C-Team”
Participants will discuss how CIC colleges and universities can create strong “C-Teams” (chief teams) for chief officers to train to understand each other’s domains. Does the model of provost as chief operating officer facilitate integration of the work of “all” chief officers? What new areas of expertise are emerging for university leaders, and what skills and attributes are needed for these new roles?

Julian Schuster, Provost and Senior Vice President, Webster University

Creating a Successful Learning Commons
This discussion will explore best practices and strategies for integrating academic student support services and library information services to create a “Learning Commons.” Participants are invited to share their experiences in reshaping the traditional library to accommodate a broader educational objective.

R. Scott Sheffield, Vice President for Academic Affairs and Dean of the Faculty, Brevard College

Developing a Sustainable Financial Model for International Recruitment and Enrollment
At Trine University, successful recruitment of international students has generated a new revenue stream and helped advance campus globalization. This rapidly increasing student population, however, requires special language, academic, and cultural services that Trine has added at a cost. Participants will discuss a sustainable financial model for international student recruitment and enrollment as well as the benefits and challenges of internationalizing campuses.

John Shannon, Vice President for Academic Affairs, Trine University

Does Tenure Have a Future?
Many private colleges and universities have transitioned from a tenure system to one that includes some full-time and adjunct positions that are not on the tenure track. How can CAOs best explain and defend tenure to boards of trustees and others that openly question the concept? How can they best explain and defend a hybrid or non-tenure system to faculty colleagues who view the change with anxiety and suspicion? Participants are invited to share their campus experiences.

Danny M. Parker, Provost, Anderson University (SC)

Doing More with Less
CAOs and CFOs will share campus practices to improve mission outcomes when program budgets stay the same or shrink while costs rise. Discussion will focus on reallocation and other funding strategies that can help budget directors stretch tight resources.

Paula F. Dehn, Vice President for Academic Affairs and Dean of the College, Kentucky Wesleyan College

Engaging Faculty Members in the Assessment of Majors
How can CAOs engage faculty members in meaningful assessment of learning in the major? At LaGrange College, a successful strategy has been to shift the focus of learning outcomes from the mission strategic plan to discipline-specific goals. Participants will share practices used at their institutions to increase faculty engagement with assessment of student learning in the major.

David L. Garrison, Provost and Chief Academic Officer, LaGrange College

Faculty Compensation Frameworks: What Is the CFO’s Role?
Working with the CFO can be an asset to the CAO in developing a good faculty compensation plan. What is the CFO’s responsibility in decision making about faculty compensation? How can CAOs and CFOs become true partners in addressing faculty compensation issues? Participants are invited to share their experiences.

Bill Muse, Vice President for Administration and Finance, Schreiner University

How to Win Campus Support for Institutional Prioritization
This discussion will focus on how to gain support from both faculty and staff members for a study of relative priorities in academic programs or administrative services. Participants with experience will exchange information about strategies.

Kerry D. Fulcher, Provost and Chief Academic Officer, Point Loma Nazarene University

George Latter, Chief Financial Officer, Point Loma Nazarene University
Mentoring Mid-Level Administrators

Mentoring mid-level administrators is an important responsibility for senior officers in both the academic and financial affairs divisions. The discussion will focus on effective strategies and best practices for ensuring that “direct reports” develop new skills and are positioned for career advancement.

Jane M. Wood, Vice President for Academic Affairs and Dean of the College, Westminster College (PA)

Moving Faculty Members toward Change

How can CAOs foster a culture of innovation within institutions that value the role of faculty members in shared governance? Participants will share experiences that have worked to build trust and acceptance.

R. Garland Young, Vice President for Academic Affairs and Dean, Milligan College

Negotiating Conflicts between the CAO and the CFO

Participants are invited to share examples of past or current conflicts and discuss how conflicts can be resolved or avoided in the future.

Chad Berry, Academic Vice President and Dean of the Faculty, Berea College

Role Immersion Pedagogies

This follow-up conversation to the 2013 concurrent session on “Reacting to the Past” explores the flipped classroom and examples of the successful use of role immersion games to enhance student learning and faculty engagement.

John M. Burney, Vice President for Academic Affairs, Doane College

Serving on External Boards

Many CAOs and CFOs are invited to serve on, and even lead, governing boards of local, regional, and national organizations. Participants will discuss the benefits and costs of such service as well as strategies to manage the time commitment and to avoid potential conflicts.

Susan Traverso, Provost and Senior Vice President, Elizabethtown College

Sharing Financial Data with Faculty Members

What financial information do CAOs and CFOs share with faculty members on CIC campuses? In what contexts is the information shared? How does such transparency contribute to community conversations and decision making regarding academic planning? Participants are invited to share experiences.

Judith A. Muyskens, Provost, Nebraska Wesleyan University

Clark Chandler, Vice President for Finance and Administration, Nebraska Wesleyan University

Space Wars: From Strategic Planning to Prioritizing Space

How can CAOs and CFOs work collaboratively to avoid space wars on their campuses? Linfield College developed a strategic facilities evaluation process that was aligned with the academic and institutional priorities of its strategic plan. Participants will learn about the outcomes of this successful process and discuss other strategies for space prioritization.

Susan Agre-Kippenhan, Vice President for Academic Affairs and Dean of Faculty, Linfield College

Mary Ann Rodriguez, Vice President for Finance and Administration, Linfield College
Sunday, November 2 • Women Chief Academic and Chief Financial Officers Luncheon
Discussion Topics

Building and Nurturing a Strong Collaborative Relationship between the CAO and CFO
Anne Skleder, Provost and Senior Vice President, Wilkes University

Cabinet Team Building
Carol Scheppard, Vice President and Dean for Academic Affairs, Bridgewater College
Anne B. Keeler, Vice President for Finance and Treasurer, Bridgewater College

Communication Strategies among Academic Affairs Colleagues
Gayle Copeland, Provost, Simpson University (CA)

Creating and Maintaining Work/Life Balance
Susan Traverso, Provost and Senior Vice President, Elizabethtown College

Diversifying the Academic Leadership Team
Linda C. DeMeritt, Provost and Dean of the College, Allegheny College
Cheryl Johnson-Odim, Provost and Senior Vice President for Academic Affairs, Dominican University (IL)

Effective Methods of Working with Faculty Members
Tracy Stewart, Academic Dean, Alaska Pacific University

Effective Methods of Working with Full- and Part-Time Faculty Members
Marion Terenzio, Vice President for Academic Affairs and Dean of the Faculty, Bloomfield College

Family-Friendly Leave Policies: Benefiting Mothers and Others
Elizabeth H. Tobin, Provost and Dean of the College, Illinois College

Fundraising Is Fun…Really!
Susan S. Hasseler, Senior Vice President for Academic Affairs and Dean of the College, Augustana College (SD)

Integrating Academic and Financial Affairs
Kimberley L. Phillips, Provost and Dean of the Faculty, Mills College

Intercollegiate Athletics
Carolyn R. Newton, Provost, The College of Wooster

Leading and Managing: Balancing and Prioritizing
Pareena Lawrence, Provost and Dean of the College, Augustana College (IL)

Managing Difficult Conversations
Leanne M. Neilson, Provost and Vice President for Academic Affairs, California Lutheran University

Managing Presidential Transitions
Patricia Draves, Vice President for Academic Affairs and Dean of the University, University of Mount Union

Mentoring Mid-Level Administrators
Janet Hanson, Vice President and Chief Financial Officer, St. Olaf College

Program Prioritization from Start to Finish
Rochelle Von Eye, Provost, Dakota Wesleyan University

Self-Renewal Strategies
Mary Boyd, Vice President for Academic Affairs, St. Edward’s University

The Wonderful, the Ugly, and the Surprises of Leadership Searches
Marylouise Fennell, RSM, Senior Counsel, CIC

What’s Next? How to Think about Next Steps in Your Career
Andrea Warren Hamos, Vice President and Senior Consultant, Academic Search, Inc.

Women and the Presidency
S. Georgia Nugent, Senior Fellow, CIC and President Emerita, Kenyon College

Women’s Leadership in the Strategic Planning Process
Marci Sortor, Provost and Dean of the College, St. Olaf College

Working with Committees of the Board of Trustees
Jonnie G. Guerra, Senior Advisor, CIC
Monday, November 3 • Breakfast Discussion Topics

Academics and Athletics: Fostering a Partnership
On a campus with a large percentage of student athletes, how can the CAO be a catalyst for a strong relationship between academic affairs and athletics? CAOs will share successful strategies for building a partnership with the athletic director and staff, promoting the academic success of student-athletes, and dealing with perennial issues such as conflicts between practice times and class times and frequent absences from class to participate in games.

Michael B. Brown, Provost and Senior Vice President for Academic Affairs, North Carolina Wesleyan College

Budget Committees: Roles and Responsibilities
CAOs and CFOs will have the opportunity to exchange information about how budget committees function on their campuses. Discussion will focus on their composition, the scope of their assigned responsibilities and decision-making authority, and their value in promoting transparency.

Joyce Blackwell, Provost and Vice President for Academic Affairs, Bennett College

Bundling Textbook Costs with Tuition
This discussion will focus on the benefits and disadvantages of bundling textbook expenses with tuition and fees. Participants will learn about Schreiner University’s model of bundling textbook costs, including the response of students and faculty members. CAOs and CFOs from institutions that have adopted textbook bundling will offer advice to those who are considering the strategy.

Charlie T. McCormick, Provost and Vice President for Academic Affairs, Schreiner University

Campus Sexual Assault Policies
(Open only to currently serving CAOs and CFOs.)
How have CIC institutions responded to U.S. Department of Education guidelines for dealing with sexual assaults? Participants will discuss the policies and training programs in place or in development on their campuses.

Jasper Lesage, Provost, Northwestern College (IA)

CAO-CFO Collaboration on New Academic Programs
This discussion will focus on CAO-CFO collaboration to ensure institutional success in initiating new majors and other academic programs. Participants will discuss the factors that affect decision making, including fit with the institution and its priorities, ties to economic development, financial risk, market demand, and the nature and source of funding.

Barbara M. Gayle, Vice President for Academic Affairs and Dean of Graduate Studies, Viterbo University

CIC’s Key Indicators Tool (KIT) and Financial Indicators Tool (FIT)
CAOs and CFOs can benefit from the use of CIC’s KIT and FIT benchmarking reports for institutional planning and decision making. Participants will discuss the content and uses of these tools and learn how they can be accessed.

Michael Williams, President, Austen Group, A RuffaloCODY Company

CIC’s Leadership Programs: Senior Leadership Academy and Executive Leadership Academy
Learn about CIC’s year-long leadership programs, Senior Leadership Academy (SLA) and Executive Leadership Academy (ELA). The SLA prepares mid-level administrators for vice presidencies in independent higher education; the ELA prepares college and university vice presidents for presidencies.

Thomas R. Kepple, Jr., President, American Academic Leadership Institute

Increasing Academic Opportunities at Small Colleges
To increase academic options for students without the expense of adding entirely new programs, Sterling College reorganized existing course offerings into new interdisciplinary programs. Participants are invited to discuss similar initiatives at their own institutions as well as other creative, low-cost, and efficient ways to expand academic opportunities for students at small colleges.

Gregory P. Kerr, Vice President for Academic Affairs, Sterling College (KS)
The goals of CIC’s Information Fluency in the Disciplines workshops, supported by the Andrew W. Mellon Foundation, are twofold: to infuse “fluency” into humanities majors and fields of concentration; and to help undergraduate students attain true information fluency in their major areas of study. The program thus far has focused on three disciplines: literature, history, and ancient studies. Campus teams comprised of faculty members, a librarian, and the chief academic officer participated in intensive workshops during which they developed campus plans. What are campuses learning about their curricula?

Susan Barnes Whyte, Library Director, Linfield College

Is There a Case for Disruptive Innovation?

Clayton M. Christensen has suggested that contemporary colleges and universities need to experience “disruptive innovation” on their campuses. Participants will discuss Christensen’s theory and whether and how it is being embraced at their institutions.

Nicholas R. Santilli, Vice President for Academic and Student Affairs, Notre Dame College (OH)

Maintaining Campus Morale during Times of Constraint

How can CAOs and CFOs collaborate to keep faculty and staff members engaged with institutional priorities during times of financial constraint? Participants will discuss strategies that can help their constituencies maintain a focus on mission and a positive attitude.

Joy Braithwaite, Chief Financial Officer, Malone University

Donald Tucker, Provost, Malone University

Managing the Unexpected: Lessons Learned from a Water-Damaged Building

Ohio Wesleyan University’s CAO and CFO quickly learned to partner when their university’s landmark building experienced major water damage five days before the start of classes. Participants will discuss first response steps, offices that must be engaged quickly, how to cope with displaced faculty and staff members, how to handle campus communications, and how to turn a disaster into an opportunity.

Daniel Hitchell, Vice President for Finance and Administration and Treasurer, Ohio Wesleyan University

Charles Stinemetz, Provost and Vice President, Ohio Wesleyan University

Network for Vocation in Undergraduate Education (NetVUE)

NetVUE seeks to deepen the intellectual and theological exploration of vocation among students and faculty and staff members at independent colleges and universities. Learn about the March 2015 national NetVUE Conference and ways your institution can benefit from NetVUE programs, regional gatherings, grants, and services.

Shirley J. Roels, Senior Advisor for NetVUE, CIC

New CAO Workshop: Continuing the Conversation

New CAOs who participated in the earlier New CAO Workshop will have an additional opportunity to discuss conference sessions, general concerns, and new ideas.

Cheryl Johnson-Odim, Provost and Senior Vice President for Academic Affairs, Dominican University (IL)

Michael A. McDonald, Provost, Kalamazoo College

Realigning Academic Structures to Save Personnel Costs

How can realigning academic structures improve institutional efficiency and reduce personnel costs? CAOs and CFOs who have made structural changes or are contemplating such a redesign will discuss opportunities to share services across divisions and other strategies that are cost effective and lower personnel costs. They also will discuss the challenges of such realignment.

Guiyou Huang, Senior Vice President for Academic Affairs, Norwich University

Resource Development through Fundraising: The CAO’s Role in Advancement Work

As CIC colleges and universities face both the reality of rising institutional costs and the need to keep tuition affordable, chief academic officers are increasingly being asked to partner with advancement personnel on fundraising projects. CAOs are invited to discuss
activities that have helped them hone fundraising skills and to share advice for attracting additional resources to the institution.

Paul C. Koch, Vice President for Academic and Student Affairs, St. Ambrose University

Searching for a Presidency
What steps should CAOs or CFOs take to prepare themselves for a search for a presidency? Is there a best time to be on the market? What key areas should be addressed in a cover letter? What questions should be answered before applying for a position? What role does the search firm play in the process? Learn about the process from a member of the Academic Search, Inc. team.

Andrea Warren Hamos, Vice President for Consulting Operations and Senior Consultant, Academic Search, Inc.

Social Media for CAOs and CFOs
How can CAOs and CFOs use social media to build community and foster communication with faculty members, students, and other constituencies? What are the pitfalls to avoid? Participants will share effective practices in the use of social media, particularly Twitter and Facebook.

Mary K. Boyd, Vice President for Academic Affairs, St. Edward’s University
Kim Kvaal, Vice President for Financial Affairs, St. Edward’s University

The Role of the Interim Chief Academic Officer
The interim chief academic officer can be internal or external, a potential candidate for the permanent position or a truly temporary appointee. The interim title can convey varying expectations, ranging from maintaining the status quo in a time of transition to leading strategic planning or other high-profile future-oriented initiatives. Participants are invited to share their experiences and discuss the opportunities and challenges of interim leadership.

Jeffrey Gingerich, Interim Provost and Vice President for Academic Affairs, Cabrini College

Transforming Academic Computing with “the Cloud”
At Roger Williams University, the CAO and CFO led the successful implementation of a cloud-based academic computing system. Participants will discuss the benefits and costs of cloud computing and learn about strategies used to overcome technical and institutional obstacles to the changes.

Jerome Williams, Executive Vice President for Finance and Administration, Roger Williams University
Andrew A. Workman, Provost and Senior Vice President, Roger Williams University

Using Strategic Indicators to Improve Institutional Accountability
Strategic indicators of institutional health, which are updated quarterly, can be useful data to provide board members. CAOs and CFOs will learn about the template used at the College of Saint Mary (NE), including the process of development, board response, and resulting campus initiatives for improvement. Participants are invited to give feedback and discuss the use of strategic indicators on their own campuses.

Sarah Kottich, Vice President for Finance and Administration, College of Saint Mary (NE)
Christine Pharr, Vice President for Academic Affairs, College of Saint Mary (NE)

Working with the Promotion and Tenure Committee
How do CAOs work with promotion and tenure committees on their campuses? What are best practices for ensuring that faculty members who serve on these crucial committees understand scholarly achievement across the disciplines and the legal implications of their role as evaluators? Participants are invited to share experiences and advice.

Wendy McCredie, Provost and Academic Vice President, Mount St. Mary’s College (CA)
Hotel Information

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Phone: (503) 226-1611

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**SKYLINE LEVEL**

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**THIRD FLOOR CONFERENCE LEVEL**
Chief Academic and Chief Financial Officers Task Force

The program of the 2014 Institute for Chief Academic and Chief Financial Officers has been planned with the assistance of CIC’s Chief Academic and Chief Financial Officers Task Force:

B. Connie Allen (Chair)
Provost
Saint Augustine’s University

Dominic Aquila
Provost and Vice President for Academic Affairs
University of St. Thomas (TX)

F. Robert Huth
Vice President for Business and Chief Financial Officer
Stetson University

Amy Jessen-Marshall
Vice President for Academic Affairs and Dean of the Faculty
Sweet Briar College

John D. Kolander
Provost
Wisconsin Lutheran College

Pareena Lawrence
Provost and Dean of the College
Augustana College (IL)

Chris McAlary
Vice President for Administration and Finance
Mount St. Mary’s College (CA)

Marlene Moore
Dean of the College and Vice President for Academic Affairs
Willamette University

Sue Palmer
Vice President for Finance and Administration
College of Saint Benedict

Elizabeth L. Paul
Provost and Vice President for Academic Affairs
Stetson University

R. Richard Ray
Provost
Hope College

Stephanie Schlachter
Provost
Lewis University

Mark Your Calendars!