THE PRESENT AND FUTURE OF FOUNDATION SUPPORT FOR LIBERAL ARTS EDUCATION

CIC Conversation between Foundation Officers and College and University Presidents

Tuesday, October 13, 2015

Convene Conference Center
32 Old Slip, New York, NY
THE PRESENT AND FUTURE OF FOUNDATION SUPPORT FOR LIBERAL ARTS EDUCATION

8:00 a.m.  BREAKFAST BUFFET

8:30 a.m.  WELCOME

Michael Gilligan, President, Henry Luce Foundation, and Member, CIC Board of Directors

Marjorie Hass, President, Austin College, and Vice Chair for Resource Development, CIC Board of Directors

GREETINGS FROM TIAA-CREF

Ronald R. Pressman, Chief Executive Officer, Institutional Financial Services

INTRODUCTION

Richard Ekman, President, Council of Independent Colleges

8:40 a.m.  SESSION I: KEYNOTE ADDRESS

The Present and Future of Foundation Support for Liberal Arts Education

Mariët Westermann, Vice President, Andrew W. Mellon Foundation

Moderator: Thomas L. Hellie, President, Linfield College, and Vice Chair for Programs, CIC Board of Directors
9:30 a.m.  **SESSION II: Foundation Support for Student Engagement and Civic Responsibility**

*Robert Hackett*, President, Bonner Foundation

*Jennifer Hoos Rothberg*, Executive Director, Einhorn Family Charitable Trust

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

10:20 a.m.  **BREAK**

10:40 a.m.  **SESSION III: Research Support for and about Independent Higher Education**

*Michael S. McPherson*, President, Spencer Foundation

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

11:30 a.m.  **SESSION IV: Corporate Foundation Support for Independent Higher Education**

*Robert A. Maginn, Jr.*, President, Jenzabar Foundation

*Timothy J. McClimon*, President, American Express Foundation

Moderator: *Paul Conn*, President, Lee University

12:20 p.m.  **BOXED LUNCHES AND ROUNDTABLE DISCUSSIONS WITH FOUNDATION EXECUTIVES**

*(See page 12 for discussion group leaders and locations.)*

1:30 p.m.  **ADJOURNMENT**
American Express believes that serving its communities is not only an essential aspect of a successful business but part of each individual’s responsibilities as citizens of the world. The mission of the American Express Foundation is to bring to life the value of good corporate citizenship by supporting communities in ways that enhance the company’s reputation with employees, customers, business partners, and other stakeholders. It does this by supporting nonprofit organizations that are preserving and sustaining unique historic places, developing new leaders, and encouraging community service where its employees and customers live and work. For more information, see http://about.americanexpress.com/csr.

Timothy J. McClimon is president, American Express Foundation, and senior vice president for corporate social responsibility, American Express Company. In these roles, he directs all of the American Express Company’s global social responsibility, philanthropy, and employee engagement programs. He also teaches graduate-level courses in nonprofit management and arts administration at New York University. Prior to joining American Express, McClimon practiced nonprofit law at Webster & Sheffield, was executive director of Second Stage Theatre in New York City and executive director of the AT&T Foundation, and managed the Inter-Arts Program at the National Endowment for the Arts. He has served on multiple boards of directors and committees, including the Council on Foundations, Independent Sector, Americans for the Arts, Philanthropy New York, and the Conference Board. McClimon holds a bachelor’s degree from Luther College, a master’s degree from St. Cloud State University, and a JD from Georgetown University Law Center.

Andrew W. Mellon Foundation

Founded in 1969, the Andrew W. Mellon Foundation strives to strengthen, promote, and, where necessary, defend the contributions of the humanities and the arts to human flourishing and to the well-being of diverse and democratic societies. To this end, the foundation supports exemplary institutions of higher
education and culture as they renew and provide access to an invaluable heritage of ambitious, path-breaking work. It currently makes grants in five core program areas: higher education and scholarship in the humanities, scholarly communications, arts and cultural heritage, diversity, and international higher education and strategic projects. Within each of these five areas, the foundation seeks institutions and programs that explore short- and long-term issues in the humanities, arts, and higher education; support the humanities, arts, education, and diversity; encourage participation by previously underrepresented communities; and involve strong collaboration. For additional information, see www.mellon.org.

Mariët Westermann is vice president of the Andrew W. Mellon Foundation. In this position, she works with the foundation's programs in higher education and scholarship in the humanities, arts and cultural heritage, and diversity. Prior to joining the foundation in 2010, Westermann was the first provost and chief academic officer of New York University Abu Dhabi. She previously served as director and professor at the Institute of Fine Arts at New York University. Westermann also has held positions as associate director of research at the Clark Art Institute and as assistant and associate professor at Rutgers University. Westermann has received fellowships and grants from the American Philosophical Society, Center for Advanced Study in the Visual Arts, Clark Art Institute, and National Endowment for the Humanities. She holds a BA from Williams College and an MA and PhD in the history of art from the New York University Institute of Fine Arts. Westermann has served as book reviews editor for The Art Bulletin and as a board member for several scholarly journals and cultural and educational institutions.

CORELLA AND BERTRAM F. BONNER FOUNDATION

The Corella and Bertram F. Bonner Foundation's mission is to improve the lives of individuals and communities by helping meet the basic needs of nutrition and educational opportunity through long-term partnerships with colleges and congregations. In 1990, the Bonner Foundation launched the first Bonner Scholars Program, the foundation's flagship education program, in partnership with Berea College in Kentucky. Designed to provide students with “access to education and an opportunity to serve,” Bonner Scholars has expanded to become the largest privately-funded, service-based college scholarship program in the country. It provides students who have a high-level of financial need and an ethic for service with four years of support and an opportunity to participate in an intensive cohort experience. With the addition of AmeriCorps Education Awards in 1997, the Bonner Leader Program enabled other campuses to replicate the model, using resources such as the Federal Work-Study Program. Today, more than 60 campuses host Bonner programs and nearly 3,000 students are engaged annually. For more information, see www.bonner.org.

Robert Hackett joined the Bonner Foundation in 1992 as vice president and director of the Bonner Scholars Program, becoming president of the foundation in July 2010. Prior to joining the Bonner Foundation, Hackett worked at Telesis Corporation and served as managing director of the Campus Outreach Opportunity League
during its first three years of operation. He also has been associated in various capacities with the Youth Policy Institute for the past 20 years. Hackett received his bachelor’s degree from Harvard University and a master’s in public and private management from the Yale University School of Organization and Management.

THE EINHORN FAMILY CHARITABLE TRUST

Established by Cheryl and David Einhorn, the Einhorn Family Charitable Trust’s mission is to help people get along better. Since its founding in 2002, the trust has granted more than $100 million to nonprofit organizations that provide age-appropriate opportunities to foster prosocial development in the United States. The trust seeks to inspire a movement of empathetic citizens, who with mutual respect and understanding, work together to create a more civil and harmonious world. Its approach is to partner with research-backed nonprofits that nurture the positive side of human nature across all life-stages. The trust supports opportunities for people to develop and practice the skills, orientation, and behaviors—kindness, empathy, cooperation, and respect—that are necessary for people to work together to solve our most difficult social problems. For more information, see www.eft.org.

Jennifer Hoos Rothberg is executive director of the Einhorn Family Charitable Trust. Rothberg became the trust’s first full-time staff member in 2007, leading the development of the foundation’s strategy and partnership approach to grant making. Before joining the trust, she served as the development director for Cornell Hillel. Rothberg received her master’s degree in regional planning, with a focus on community development and nonprofit management, and a BS in urban and regional studies with honors, from Cornell University. She currently serves on the board of Repair the World and previously served on the Family Philanthropy Committee of the Council on Foundations and the board of Cornell Hillel.

THE JENZABAR FOUNDATION

The mission of the Jenzabar Foundation is to recognize and support the good works and humanitarian efforts of student leaders serving others across the global community. The foundation seeks to foster a culture of service and to educate and inspire future generations to create a better world. Through its institutional grants program, the Jenzabar Foundation supports institutions of higher education and other nonprofit organizations that foster the development of student leaders, promote community service, and are committed to their local communities. It also recognizes, through its Student Leadership Awards, student groups that demonstrate a commitment to community service and to humanitarian efforts across the world. For more information, see www.thejenzabarfoundation.org/about.
Robert A. Maginn, Jr. serves as chair of the Jenzabar Foundation. In this position, he oversees the foundation’s widespread programs for funding institutions of higher education, nonprofit organizations, and student leaders for their humanitarian efforts within local and global communities. Maginn also serves as chairman of the board of directors and chief executive officer of Jenzabar, Inc. Prior to joining Jenzabar, he was both senior partner and director at Bain & Company. Maginn serves on the board of One Family, Inc., and served on the educational board of the Software & Information Industry Association in 2005–2007. He holds an MBA from Harvard Business School, a master of liberal arts degree in government from Harvard University, and a BS degree in business administration from the University of Dayton.

THE SPENCER FOUNDATION

Established in 1962 by Lyle M. Spencer, the Spencer Foundation began formal grantmaking in 1971. Over the past 30 years, the foundation has made nearly $500 million in grants. Following Spencer’s direction, the foundation is dedicated to the belief that research is necessary to improvement in education, and thus supports high-quality and innovative research. Its programs include large and small research grants, research-practice partnership grants, and the New Civics, to name a few. The Spencer Foundation also is dedicated to strengthening and renewing the educational research community through its fellowship and training programs. For more information, see www.spencer.org/content.cfm/mission.

Michael S. McPherson is president of the Spencer Foundation. Prior to joining the foundation in 2003, McPherson served as president of Macalester College for seven years. Earlier, McPherson spent 22 years as professor of economics, chair of the economics department, and dean of faculty at Williams College. He is co-author or editor of several books, including College Access: Opportunity or Privilege?; Keeping College Affordable; and Economic Analysis, Moral Philosophy, and Public Policy, and was founding co-editor of the journal Economics and Philosophy. McPherson has served as a trustee of the College Board, the American Council on Education, and the Minneapolis Institute of Arts, and as a member of the TIAA Board of Overseers for the past ten years and as its president for the past five. In addition, McPherson has been a fellow of the Institute for Advanced Study and a senior fellow at the Brookings Institution. He holds a BA in mathematics and an MA and PhD in economics from the University of Chicago.
TIAA-CREF helps provide lifelong financial security for those in the academic, cultural, governmental, medical, and research fields. The company invests for the long term and applies deep expertise across a wide range of traditional and alternative assets. Its mission to serve, its record of performance, and the values it embraces make it a different kind of financial services company. For additional information, see www.tiaa-cref.org.

Ronald R. Pressman is chief executive officer, Institutional Financial Services, at TIAA-CREF and a member of the company’s executive management team. In this role, Pressman is responsible for overseeing TIAA-CREF’s retirement, endowment money management, and health retirement programming for all of TIAA-CREF’s clients that are nonprofit institutions, including CIC member institutions. Pressman has more than 30 years of industry experience in the financial services, investment management, real estate, and insurance industries. Prior to joining TIAA-CREF in January 2012, he served as president and CEO of GE Capital Real Estate and as director of the GE Capital Services and GE Capital Corporation boards. Previously, he served as president and CEO of GE Asset Management and chairman, president, and CEO of GE Employers Reinsurance Group. Pressman also held global leadership positions as the CEO of GE Energy Europe, Africa, Middle East, and Southwest Asia and the general manager for GE International's Central and Eastern European markets. Pressman is a graduate of Hamilton College, where he continues to serve as a charter trustee. He is currently a director of Aspen Insurance Holdings Limited. In addition, Pressman holds leadership positions in various philanthropic organizations, serving as the chair of the National Board of A Better Chance and as a director of Pathways to College.
Paul Conn has served as president of Lee University for 28 years. During his administration, the university has seen significant growth: Enrollment has increased from 1,200 to over 5,000, the physical campus has been substantially enlarged and rebuilt, and the university’s reputation as a regional leader has been established. Conn has served on the Board of Directors of the Council of Independent Colleges and was chair of the President’s Council of the Southern States Athletic Conference. In addition to his scholarly publications, Conn has enjoyed a second career as a freelance writer. He has authored or co-authored 20 popular books, sharing bylines with such personalities as Johnny Cash, pro football star Terry Bradshaw, businessmen Jack Eckerd and Richard DeVos, and many others. Four of his books have been listed on the New York Times bestseller list, and his book The Possible Dream was the #7 bestselling non-fiction book of 1977, according to Publishers Weekly. Conn earned a PhD in psychology from Emory University in 1974. He did his undergraduate work at Lee College and Georgia State University and earned an MA at Emory University.

Richard Ekman has been president of the Council of Independent Colleges since 2000. During his tenure, CIC has increased in membership, added many programs and services, and increased participation levels in CIC’s major programs. He previously served as vice president for programs of Atlantic Philanthropies and, from 1991 to 1999, as secretary and senior program officer of the Andrew W. Mellon Foundation. From 1982 until 1991, Ekman was at the National Endowment for the Humanities, successively as director of the Division of Education Programs and the Division of Research Programs. His previous experience includes service as vice president and dean of Hiram College, where he also was a tenured member of the history faculty; and assistant to the provost at the University of Massachusetts at Boston. Ekman currently serves as a member of many boards, including those of Project Pericles, Harvard University’s library and its graduate school of arts and sciences, American Academic Leadership Institute, and American Council on Education. He is a recipient of the W.E.B. DuBois Medal of Harvard University. Ekman is co-author, with Richard E. Quandt, of Technology and Scholarly Communication (University of California Press, 1999). He earned his AB in history and PhD in the history of American civilization from Harvard University.
**Michael Gilligan** is president of the Henry Luce Foundation. He was elected president of the foundation in December 2002, having been program director for theology since 1998. Gilligan previously served at the Association of Theological Schools (ATS); as academic dean of the Pontifical College Josephinum; and as a teacher and administrator in the Catholic Diocese of Columbus. He is chair of the United Board for Christian Higher Education in Asia, and serves on the Board of Directors of the Council of Independent Colleges. Gilligan received a BA from Duke University and an MA and PhD in English from the University of Virginia.

**Marjorie Hass** became the 15th president of Austin College in Texas in July 2009 and has strengthened the college’s firm foundation of success, promoting a culture of academic excellence and a commitment to educational access for talented students regardless of their financial background. Her vision includes development of the college’s long-standing core values of global awareness and engaged citizenship, an emphasis on sound financial and environmental responsibility, and re-animation of the liberal arts in today’s digital era. Hass is an accomplished spokesperson for the significant influence of liberal arts education both on individuals and local and world communities. Engaged with higher education issues beyond her own campus, Hass is a member of the boards of the Council of Independent Colleges, the National Association of Independent Colleges and Universities, and the Independent Colleges and Universities of Texas, and she is a presidential sponsor for the Texas Women in Higher Education conference. Prior to her presidency at Austin College, Hass served as provost at Muhlenberg College. Her scholarship and teaching focus on issues in the philosophy of language and philosophy of logic. Hass earned a bachelor's degree, master's degree, and PhD in philosophy at the University of Illinois, Urbana-Champaign.

**Thomas L. Hellie** is the 19th president of Linfield College. He has spent his entire professional career in higher education. Hellie was a tenured faculty member in theatre and English at Hiram College in Ohio from 1980 to 1989. He served first as program officer and then as vice president of the Associated Colleges of the Midwest (ACM) from 1989 to 1999. Prior to assuming the presidency of Linfield College in 2006, he spent six years as president and executive director of the James S. Kemper Foundation in Chicago. Hellie studied and taught abroad and also administered off-campus study programs at a dozen sites on four continents while at the ACM. He previously served as a trustee of Lenoir-Rhyne College in North Carolina and as a trustee of the U.S. Business School in Prague, Czech Republic. In 1996, Palacky University (Czech Republic) awarded him its highest honor, the Pametni Medal, for his contributions to Czech higher education. Hellie holds a bachelor's degree (magna cum laude) in theatre from Luther College and a master's degree and PhD in theatre history from the University of Missouri-Columbia.
Mary B. Marcy, president of Dominican University of California, has led major education reform and diversification initiatives, supported the advancement of faculty and students, and enhanced the reputation and reach of the institutions she has served. Marcy currently serves on the editorial board of Liberal Education, the academic advisory council of the Panetta Institute, the Steering Committee of the Council of Independent Colleges’ Project on the Future of Independent Higher Education, and CIC’s New Presidents Program Advisory Council. In 2012, 2013, and 2014, Marcy was named one of the Bay Area’s “Most Influential Women in Business” by the San Francisco Business Times in recognition of her exemplary leadership in higher education. Prior to joining Dominican, she served as provost of Bard College at Simon's Rock and vice president at Bard College from 2004 until 2011. A political scientist, Marcy earned her doctorate and master’s degrees from the University of Oxford. Her research focuses on women in American politics, and she has published extensively on issues of diversity, leadership, and strategy in higher education. Marcy received a bachelor of arts degree with honors from the University of Nebraska.

Helen J. Streubert is the seventh president of the College of Saint Elizabeth and the first lay president in the 116-year history of the college. Previously, she was vice president for academic affairs of Our Lady of the Lake University in San Antonio, Texas. Streubert is recognized both nationally and internationally for her textbook, Qualitative Research in Nursing: Advancing the Humanistic Imperative, which has been published in four languages and is in its fifth printing. She was inducted into the inaugural class of Fellows in Nursing Education (National League for Nursing), an elite group of 41 nurse educators recognized for their significant contributions in nursing education. More recently, she was honored for her service to the field of nursing when she was inducted into the Teachers College Nursing Education Alumni Hall of Fame. Streubert holds a doctoral degree from Teacher's College, Columbia University, New York, a master of science in nursing from Villanova University, and a bachelor of science degree from Cedar Crest College.
## Discussion Group Locations

**Discussion Leaders**

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