



THE COUNCIL OF  
INDEPENDENT COLLEGES

# THE CAO-CFO PARTNERSHIP:

*Blending Perspectives to Build Stronger Institutions*

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WILLIAMSBURG, VIRGINIA ♦ NOVEMBER 6–9, 2010

38<sup>th</sup> ANNUAL INSTITUTE FOR CHIEF ACADEMIC OFFICERS  
AND CHIEF FINANCIAL OFFICERS

*In cooperation with the National Association of College and University Business Officers*



CONFERENCE PROGRAM

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*CIC is deeply thankful to TIAA-CREF for its long-term and generous support.*

## MARK YOUR CALENDARS!

**39<sup>th</sup> Annual Institute for Chief Academic Officers and Chief Advancement Officers**  
St. Petersburg, Florida | November 5-8, 2011

*You are encouraged to invite your chief advancement officer to attend this conference with you.*

**40<sup>th</sup> Annual Institute for Chief Academic Officers**  
San Antonio, Texas | November 3-6, 2012



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# SCHEDULE-AT-A-GLANCE

## SATURDAY, NOVEMBER 6

7:30 a.m.–5:00 p.m.

**CAO-CFO Institute Registration and Idea Exchange**  
*Promenade Foyer*

8:00 a.m.–4:30 p.m.

**WORKSHOP—New Chief Academic Officers**  
*Taylor 1–2*

8:00 a.m.–4:00 p.m.

**WORKSHOP—CAOs in Their Third or Fourth Year of Service**  
*Room D*

9:00–11:00 a.m.

**Concordia University System Chief Academic Officers**  
*Room 6*

9:00 a.m.–3:00 p.m.

**Mennonite Colleges Chief Academic Officers and Chief Financial Officers**  
*Room B*

Noon–4:00 p.m.

**TIAA-CREF Consultations**  
*Room 5 and Room C*

1:00–3:30 p.m.

**Catholic Colleges and Universities Chief Academic Officers and Chief Financial Officers**  
*Room 11*

3:00–4:00 p.m.

**CAO Mentors Meeting**  
*Room 6*

3:30–4:00 p.m.

**CAO Task Force Meeting**  
*Room A*

4:00–4:30 p.m.

**Mentors Meet New CAOs**  
*Taylor 1–2*

5:00–6:30 p.m.

**WELCOME AND KEYNOTE ADDRESS—Andrew Delbanco**  
*Auditorium*

6:30–7:15 p.m.

**Welcoming Reception**  
*Promenade*

7:15–9:00 p.m.

**Buffet Dinner**  
*Presidents Ballroom*

## SUNDAY, NOVEMBER 7

7:00 a.m.–5:00 p.m.

**CAO-CFO Institute Registration and Idea Exchange**  
*Promenade Foyer*

7:15–7:45 a.m.

**Roman Catholic Mass**  
*Room 18*

7:30–8:45 a.m.

**Breakfast Discussions**  
*Presidents Ballroom*

8:00 a.m.–5:00 p.m.

**TIAA-CREF Consultations**  
*Room 5 and Room C*

8:15–8:45 a.m.

**Ecumenical Worship Service**  
*Room 12*

9:00–10:00 a.m.

**PLENARY SESSION—Sarah E. Turner**  
*Auditorium*

10:30–11:45 a.m.

**Welcome Coffee for CAO-CFO Spouses**  
*Room B*

10:30–11:45 a.m.

**CONCURRENT SESSIONS**

**Best Practices in Developing the Annual Budget**  
*Taylor 1–4*

**Creating a Culture of Retirement Incentives**  
*Room 15*

**Preventive Law I—Managing the Hiring Practice**  
*Harrison 1–4*

**Tuition Discounting as Enrollment Management Strategy**  
*Room 18*

**Why Linking Pedagogy to Assessment Makes Sense**  
*Room 16*

11:45 a.m.–1:30 p.m.

**Free Time for Lunch**

Noon–1:30 p.m.

**Women CAO-CFO Discussion Groups and Luncheon**  
*Adams*

1:30–2:45 p.m.

**CONCURRENT SESSIONS**

**Assuring Quality in Three-year Undergraduate Programs**  
*Taylor 1–4*

**CAO-CFO Open Mike**  
*Room 15*

**Education for Vocation: Roles for Chief Academic Officers**  
*Room 18*

**Planning for the Spatial Needs of the 21<sup>st</sup> Century Campus**  
*Room 11*

**Preventive Law II—Best Practices in Employee Evaluation**  
*Harrison 1–4*

**The Wabash Study**  
*Room D*

3:00–4:15 p.m.

**CONCURRENT SESSIONS**

**Conflict Management Skills for Senior Officers**  
*Taylor 1–4*

**Fundraising and the CAO**  
*Room 18*

**Managing Faculty Compensation Frameworks**  
*Room 16*

**Redesigned Learning Spaces in Existing Facilities**  
*Amphitheatre*

**Shared Governance: Where Does the CAO Fit In?**  
*Harrison 1–4*

4:30–5:30 p.m.  
**CAO Mentor Program** (*For New CAO Workshop participants only*)  
*Room 18*

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

“Future Perfect”—A Strategic Planning Tool  
*Taylor 1–4*

Is a College Presidency in Your Future?  
*Amphitheatre*

Professional Development Opportunities for New Faculty Colleagues  
*Harrison 1–2*

Residential Undergraduate Programs for Single Parents  
*Room 16*

6:15 p.m.  
**Dine-around Dinners**  
*(Meet in the hotel lobby.)*

6:30 p.m.  
**Colonial Dine-around Dinner**  
*(Meet in the hotel lobby.)*

## MONDAY, NOVEMBER 8

7:00 a.m.–5:00 p.m.  
**CAO-CFO Institute Registration and Idea Exchange**  
*Promenade Foyer*

7:30–8:45 a.m.  
**Annapolis Group Chief Academic Officers Breakfast**  
*Harrison 1*

7:30–8:45 a.m.  
**Historically Black Colleges and Universities Breakfast for Chief Academic Officers and Chief Financial Officers**  
*Harrison 2*

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

7:30–8:45 a.m.  
**Spouses Breakfast Discussions**  
*Room 12*

8:00 a.m.–5:00 p.m.  
**TIAA-CREF Consultations**  
*Room 5 and Room C*

9:00–10:00 a.m.  
**PLENARY SESSION—Kent Chabotar**  
*Auditorium*

10:15–11:15 p.m.  
**CONCURRENT SESSIONS**

Budgeting Instructional Costs Using CIC’s Key Indicators Tool (KIT)  
*Harrison 1–4*

Challenges of Implementing New General Education Programs  
*Taylor 1–2*

Developing an Online Education Initiative  
*Taylor 3–4*

Preparing for a Presidency  
*Room D*

Stopping to Breathe  
*Center Lounge*

10:15–11:45 a.m.  
**SPOUSES PROGRAM**  
**Open Mike for CAO and CFO Spouses**  
*Room 12*

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

Building Stronger Institutions Using CIC’s Financial Indicators Tool (FIT)  
*Harrison 1–4*

Expanding Access and Managing Growth  
*Rooms A–B*

Finding Resources for Program Development  
*Amphitheatre*

Position Descriptions for Department Chairs  
*Rooms 2–3*

Post-tenure Review and Alternative Review Models  
*Taylor 3–4*

12:30–1:30 p.m.  
**Missouri Chief Academic Officers and Chief Financial Officers Luncheon**  
*(Meet in the hotel lobby.)*

12:30–2:00 p.m.  
**Women’s College Coalition Luncheon for Chief Academic Officers and Chief Financial Officers**  
*Terrace Room*

12:30–1:30 p.m.  
**Free Time for Lunch**

1:30–3:30 p.m.  
**Open Forum with Kent Chabotar**  
*Harrison 1–2*

1:30–5:30 p.m.  
**Optional Excursion—Jamestown Settlement**  
*(Meet in the hotel lobby.)*

2:00–5:00 p.m.  
**WORKSHOP—Prioritizing Academic Programs and Services**  
*Harrison 3–4*

5:30–6:30 p.m.  
**Reception for CIC Non-member Institutions**  
*Harrison 1*

6:30 p.m.  
**Free Time for Dinner**

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

American Benedictine Colleges Chief Academic Officers and Chief Financial Officers  
*(Meet in the hotel lobby.)*

Association of Colleges of Sisters of Saint Joseph Chief Academic Officers and Chief Financial Officers  
*Room G*

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

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

**TUESDAY, NOVEMBER 9**

**Association of Presbyterian Colleges and Universities Chief Academic Officers and Chief Financial Officers**

*(Meet in the hotel lobby.)*

**Conference for Mercy Higher Education Chief Academic Officers and Chief Financial Officers**

*(Meet in the hotel lobby.)*

**Council for Christian Colleges & Universities Chief Academic Officers and Chief Financial Officers**

*(Harrison 3)*

**National Association of Schools and Colleges of the United Methodist Church Chief Academic Officers, Chief Financial Officers, and Spouses**

*(Meet in the hotel lobby.)*

7:00 a.m.–Noon

**CAO-CFO Institute Registration and Idea Exchange**

*Promenade Foyer*

7:30–8:45 a.m.

**Breakfast Discussions**

*Presidents Ballroom*

7:30–8:45 a.m.

**Spouses Breakfast Discussions**

*Room 12*

8:00 a.m.–Noon

**TIAA-CREF Consultations**

*Room 5 and Room C*

9:00–10:15 a.m.

**Spouses Program**

*Room 12*

9:00–10:15 a.m.

**CONCURRENT SESSIONS**

**Cross-functional Teams in the Budget and Planning Process**

*Harrison 1–2*

**Developing a Risk Management Strategy**

*Taylor 1–2*

**Equipping Students for the Future**

*Harrison 3–4*

**Sustaining International Programs**

*Taylor 3–4*

10:45 a.m.–Noon

**CLOSING PLENARY SESSION—**

**Richard L. Morrill and John D.**

**Walda**

*Auditorium*

Noon

**INSTITUTE ADJOURNS**

**POST-INSTITUTE EVENTS**

12:15–3:00 p.m.

**CAO Task Force Meeting**

*Terrace Room*

1:00–5:00 p.m.

**CIC/Aspen/Wye Seminar on Educational Leadership in a Global Context**

*Center Lounge*

1:30–6:00 p.m.

**Optional Excursion—Tour of**

**Colonial Williamsburg**

*(Meet in the hotel lobby.)*

# WORKSHOP FOR NEW CHIEF ACADEMIC OFFICERS

## Saturday, November 6

Sponsored by SunGard Higher Education

8:00–8:20 a.m.

Taylor 1–2

### Welcome

**Ginny Coombs**, Vice President for Annual Programs, CIC

8:20–9:05 a.m.

### Introductions

**Jeffrey H. Barker**, Vice President for Academic Affairs and Dean of the College of Humanities and Sciences, Converse College

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

**Michael Le Roy**, Executive Vice President for Academic Affairs and Dean of Faculty, Whitworth University

9:05–10:00 a.m.

### Developing Professional Relationships to Meet New Expectations

**Cynthia Zane**, President, Hilbert College

Moderator: **Michael Le Roy**, Executive Vice President for Academic Affairs and Dean of Faculty, Whitworth University

10:00–10:15 a.m.

### Break

10:15 a.m.–Noon

### Case Studies

Moderator: **Jeffrey H. Barker**, Vice President for Academic Affairs and Dean of the College of Humanities and Sciences, Converse College

**Christopher Ames**, Provost and Dean of the College, Washington College (MD)

**Jeffrey P. Aper**, Provost, Blackburn College

**Johnella Butler**, Provost and Vice President for Academic Affairs, Spelman College

**Cheryl Johnson-Odim**, Provost, Dominican University (IL)

**Donal O'Shea**, Vice President for Academic Affairs and Dean of Faculty, Mount Holyoke College

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

12:15–1:15 p.m.

Center Lounge

### New CAO Luncheon

Invocation: **Mary Ann Gawalek**, Provost and Dean of the Faculty, Seton Hill University

1:15–1:30 p.m.

*Taylor 1–2*

## Welcome

**Richard Ekman**, President, CIC

1:30–3:00 p.m.

## Roundtable Discussions

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

### Assessment and Accreditation

**Randall G. Basinger**, Provost, Messiah College

### The CAO's Role in Curriculum Development

**Mary Kelly-Powell**, Vice President for Academic Affairs, Edgewood College

### Faculty Governance

**Leslie T. Lambert**, Provost and Vice President for Academic Affairs, Ferrum College

### Fostering Faculty Leadership

**Lizbeth Martin**, Vice President for Academic Affairs, Holy Names University

### Managing Time, Technology, and Paper

**Michael Le Roy**, Executive Vice President for Academic Affairs and Dean of Faculty, Whitworth University

### Working with Peer Administrators

**Dorothy A. Prisco**, Vice President for Academic Affairs, Delaware Valley College

3:00–3:15 p.m.

## Break

3:15–3:40 p.m.

## Open Mike

**Jeffrey H. Barker**, Vice President for Academic Affairs and Dean of the College of Humanities and Sciences, Converse College

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

**Michael Le Roy**, Executive Vice President for Academic Affairs and Dean of Faculty, Whitworth University

3:40–4:00 p.m.

## Re-entry to Campus—What Did I Hear?

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

4:00–4:30 p.m.

*Taylor 1–2*

## Mentors Meet New CAOs

Mentor Coordinators:

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

**Dean de la Motte**, Vice President for Academic Affairs, Salve Regina University

Mentors:

**Dennis Atherton**, Provost, University of the Southwest

**Marilyn Barry**, Academic Dean, Alaska Pacific University

**Paul Burkhardt**, Chief Academic Officer, Prescott College

**Jamie Comstock**, Provost and Vice President for Academic Affairs,  
Butler University

**William Craft**, Vice President for Academic Affairs and Dean of the  
College, Luther College

**Joseph Dieker**, Provost, Cornell College (IA)

**Susan Dunton**, Provost, Fisher College

**Thomas Falkner**, Provost and Dean of the Faculty, McDaniel College

**Terrence Grimes**, Chief Academic Officer and Vice President for  
Academic Affairs, Barton College

**Christopher Holoman**, Provost and Vice President for Academic Affairs,  
Hilbert College

**Augustine G. Kelly, OSB**, Vice President for Academic Affairs, Saint  
Anselm College

**Donal O'Shea**, Vice President for Academic Affairs and Dean of  
Faculty, Mount Holyoke College

**Marc M. Roy**, Provost, Goucher College

**Sneh Veena**, Provost and Vice President for Academic Affairs, Heritage  
University

4:30 p.m.

**New CAO Workshop Adjourns**

# WORKSHOP FOR CAOS IN THEIR THIRD OR FOURTH YEAR OF SERVICE

Saturday, November 6

Coordinators:

**David Brailow**, Vice President for Academic Affairs and Dean of the College, Franklin College (IN)

**Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

8:00–8:15 a.m.

Room D

## Welcome

**Barbara Hetrick**, Senior Vice President, CIC

**Christoph Kunkel**, Vice President for Operations, CIC

8:15–8:30 a.m.

## Framing the Day

**Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

8:30–9:00 a.m.

## Introductions

**Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

9:00–10:30 a.m.

## Reflecting on the Moment

**David Brailow**, Vice President for Academic Affairs and Dean of the College, Franklin College (IN)

Discussion led by facilitators:

**Laura Armesto**, Vice President for Academic Affairs, Chatham University

**Robert L. Entzinger**, Provost, Hendrix College

**Bryon Grigsby**, Senior Vice President and Vice President for Academic Affairs, Shenandoah University

**Adrienne Israel**, Vice President for Academic Affairs and Academic Dean, Guilford College

10:30–10:45 a.m.

## Break

10:45–11:45 a.m.

## Soul Care

**Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

Discussion led by facilitators

11:45 a.m. -Noon

### Break

Noon-1:15 p.m.

*Terrace Room*

### Lunch

Invocation: **Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

1:15-2:45 p.m.

*Room D*

### Envisioning the Future: Reflecting on Your Leadership

**David Brailow**, Vice President for Academic Affairs and Dean of the College, Franklin College (IN)

**Bryon Grigsby**, Senior Vice President and Vice President for Academic Affairs, Shenandoah University

**Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

Discussion led by facilitators

2:45-3:00 p.m.

### Break

3:00-4:00 p.m.

### Academic Leadership: From Manager to Strategic Visionary

**David Brailow**, Vice President for Academic Affairs and Dean of the College, Franklin College (IN)

**Stephanie Quinn**, Executive Vice President and Dean of the College, Rockford College

4:00 p.m.

### Workshop Adjourns

# PRE-INSTITUTE ACTIVITIES

## Saturday, November 6

9:00–11:00 a.m.

Room 6

### Concordia University System Chief Academic Officers

Convener: **Gayle Grotjan**, Director for Cooperative Services, Concordia University System

9:00 a.m.–3:00 p.m.

Room B

### Mennonite Colleges Chief Academic Officers and Chief Financial Officers Meeting

Convener: **Sally Weaver Sommer**, Vice President and Dean of Academic Affairs, Bluffton University

Noon–4:00 p.m.

Room 5 and Room C

### CONSULTATIONS

(Sign up for all consultations at the CIC Registration Desk.)

### Planning for Your Retirement: Personal Consultations with TIAA-CREF

Representatives David Carrara and Tim Chapman will be available to schedule appointments on Saturday, November 6, Noon–4:00 p.m., and for consultations on the following days:

Sunday, November 7, 8:00 a.m.–5:00 p.m.

Monday, November 8, 8:00 a.m.–5:00 p.m.

Tuesday, November 9, 8:00 a.m.–Noon

1:00–3:30 p.m.

Room 11

### Catholic Colleges and Universities Chief Academic Officers and Chief Financial Officers Meeting

Coordinator: **Denise J. Doyle**, Provost, University of the Incarnate Word

3:00–4:00 p.m.

Room 6

### CAO Mentors Meeting

3:30–4:00 p.m.

Room A

### CAO Task Force Meeting

4:00–4:30 p.m.

Taylor 1–2

### Mentors Meet New CAOs

All 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 who work with experienced colleagues. Issues raised by the new CAOs will be the topics of discussions led by the mentors.

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

**Dean de la Motte**, Vice President for Academic Affairs, Salve Regina University

# 2010 INSTITUTE FOR CHIEF ACADEMIC AND CHIEF FINANCIAL OFFICERS

## Saturday, November 6

7:30 a.m.–5:00 p.m.

*Promenade Foyer*

### CAO-CFO Institute Registration

#### Idea Exchange

Display area for sharing materials with colleagues

5:00–6:30 p.m.

*Auditorium*

## OPENING PLENARY SESSION

### Welcome and Presentation of Awards

**Rita E. Knuesel**, Provost, College of Saint Benedict/St. John's University and Chair, Chief Academic Officers Task Force

**Richard Ekman**, President, CIC

### Awards for Service to the CIC CAO Task Force

**Rita E. Knuesel**, Provost, College of Saint Benedict/St. John's University and Chair, Chief Academic Officers Task Force

**Linda Lankewicz**, Provost, Sewanee: The University of the South

**George E. Miller**, Vice President for Academic Affairs, Claflin University

### 2010 Chief Academic Officer Award



**William F. Pollard**, vice president and dean of the college and professor of English at Transylvania University, is the recipient of the 2010 CIC Chief Academic Officer Award in recognition of his contributions to colleagues at independent colleges and universities. As a member of the CIC Chief Academic Officers Task Force (2006–2009) he has helped develop programs and chaired several sessions at the annual Institutes for Chief Academic Officers.

For over 15 years Pollard has been an active evaluator for the Southern Association of Colleges and Schools' (SACS) Commission on Colleges, serving as a team member and chair for on-site and off-site SACS committees. Pollard has published on medieval English literature and is co-editor of *Mysticism and Spirituality in Medieval England* with Robert Boenig and *Vox Mystica: Essays on the English Mystical Tradition Honoring Valerie Lagorio* with Anne Bartlett, Thomas Bestul, and Janet Goebel. Prior to his service at Transylvania, he was provost and dean of the college and professor of English at Georgetown College (KY) and vice president and dean of the college and professor of English at Huntingdon College. Pollard is a member of Phi Kappa Phi and

Omicron Delta Kappa national honorary societies. He is a member of the American Conference of Academic Deans and has served as president of the Association of Chief Academic Officers of the Southern States and as the organization's secretary.

### 2010 Academic Leadership Award



The CIC Award for Academic Leadership recognizes the contributions **Charles F. Blaich** has made as head of the Wabash National Study of Liberal Arts Education. Blaich is director of inquiries for the Center of Inquiry in the Liberal Arts at Wabash College. The longitudinal study investigates the critical factors that affect the outcomes of liberal arts education to help colleges improve student learning and enhance the educational impact of their programs. The Wabash study focuses on such outcomes as critical thinking, the need for cognition, interest in and attitudes about diversity, leadership, moral reasoning, and spiritual well-being. More than two dozen CIC colleges and universities have participated in the study since its inception in 2006.

An associate professor in psychology, Blaich was awarded the Daniel S. Evans Endowed Chair for Excellence in Teaching in the Social Sciences and McLain-McTurnan-Arnold Excellence in Teaching Award. His recent published research includes "How Effective are the NSSE Benchmarks in Predicting Important Educational Outcomes?" with Ernest T. Pascarella and Tricia A. Seifert in *Change Magazine* (2010); "Liberal Arts Colleges and Good Practices in Undergraduate Education: Additional Evidence," with Tricia A. Seifert, Mark H. Salisbury, and Ernest T. Pascarella in *Journal of College Student Development*; and "The Effects of Work on Leadership Development Among First-year College Students," with Mark H. Salisbury, Ernest T. Pascarella, and Ryan D. Padgett, forthcoming in *Journal of College Student Development*. In 2009, Blaich delivered a well received address at the CIC/CLA Consortium summer meeting on educational practices that predict student learning outcomes.

## KEYNOTE ADDRESS

### What is College For?



**Andrew Delbanco** will address the challenges of campus leadership in a time of economic constraints. He will discuss new models for liberal arts colleges that successfully preserve the essential elements of a small college education.

Delbanco is Julian Clarence Levi Professor in the Humanities at Columbia University. He is the author of *Melville: His World and Work* (2005), *The Real American Dream* (1999), and *Required Reading: Why Our American Classics Matter Now* (1997). Delbanco's essays appear regularly in *The New York Review of Books*, *The New Republic*, *Raritan*, and other journals on topics ranging from American literary and religious history to contemporary issues in higher education. He is currently at work on two short books, *The Abolitionist Imagination*,

to be published by Harvard University Press, and *College: What it Was, Is, and Should Be*, to be published by Princeton University Press.

Winner of the 2006 Great Teacher Award from the Society of Columbia Graduates, Delbanco was named New York State Scholar of the Year by the New York Council for the Humanities in 2003 and was elected a fellow of the American Academy of Arts and Sciences in 2001. Delbanco has received fellowships from the Guggenheim Foundation, the American Council of Learned Societies, and the National Endowment for the Humanities and was a member of the inaugural class of fellows at the New York Public Library Center for Scholars and Writers. He is a trustee of the National Humanities Center and the Library of America and has served as vice president of PEN American Center.

6:30–7:15 p.m.

*Promenade*

### Welcoming Reception

*(Admission by conference badge)*

All registered conference participants are welcome to gather, connecting with old friends and meeting new ones. Conference participants who wish to bring a guest who is not registered for the conference to the welcoming reception and buffet dinner may purchase a dinner badge for that person at the CIC Registration Desk.

7:15–9:00 p.m.

*Presidents Ballroom*

### Buffet Dinner

*(Admission by conference badge)*

# SUNDAY, NOVEMBER 7

7:00 a.m.–5:00 p.m.

*Promenade Foyer*

## **CAO-CFO Institute Registration**

### **Idea Exchange**

Display area for sharing materials with colleagues

### **Dine-around Dinner Sign-Up**

To get to know colleagues and spouses from other campuses and exchange ideas over dinner in area restaurants, you are encouraged to sign up at the CIC Registration Desk to join a “dine-around dinner” group. CIC will arrange transportation for the dinners. Participants are responsible for their own meal expenses. Please sign up by 2:00 p.m. so that CIC can make reservations. Groups will meet in the hotel lobby at 6:15 p.m.

7:15–7:45 a.m.

*Room 18*

### **Roman Catholic Mass**

**Augustine G. Kelly, OSB**, Vice President for Academic Affairs and Dean of the College, Saint Anselm College

7:30–8:45 a.m.

*Presidents Ballroom*

### **Breakfast Discussions**

Continental breakfast is provided for all Institute participants. Participants may join colleagues at tables designated for a state or region.

8:00 a.m.–5:00 p.m.

*Room 5 and Room C*

## CONSULTATIONS

*(Sign up for all consultations at the CIC Registration Desk.)*

### **Planning for Your Retirement: Personal Consultations with TIAA-CREF**

Representatives David Carrara and Tim Chapman will be available for consultations:

Sunday, November 7, 8:00 a.m.–5:00 p.m.

Monday, November 8, 8:00 a.m.–5:00 p.m.

Tuesday, November 9, 8:00 a.m.–Noon

8:15–8:45 a.m.

*Room 12*

### **Ecumenical Worship Service**

**David Fienen**, Provost and Vice President for Academic Affairs, Gustavus Adolphus College

8:45–9:00 a.m.

### **Break**

9:00–10:00 a.m.

Auditorium

## PLENARY SESSION

### Increased Opportunities for Low-Income Students to Succeed



**Sarah E. Turner** will review current research on the effects of opportunities for low-income students to earn undergraduate degrees. She will also discuss the record of success that CIC institutions have had in admitting and graduating “at risk” students, especially first-generation and low-income college students. Finally, she will suggest strategies that CIC institutions might consider to enhance their

efforts and to link them to the larger national conversation about access and success.

Turner is University Professor of Economics and Education at the University of Virginia. She specializes in the economics of education in the United States and has written extensively on the behavioral effects of financial aid policy. Turner’s publications include “Faculty without Students: Resource Allocation in Higher Education” (with William Johnson) in *Journal of Economic Perspectives*; “Blurring the Boundary: Changes in the Transition from College Participation to Adulthood” (with Maria Fitzpatrick) in *The Economics of the Transition to Adulthood*, edited by Sheldon Danziger and Cecilia Rouse, Russell Sage Foundation; and “Higher Education: Policies Generating the 21<sup>st</sup> Century Workforce” in *Workforce Policies for a Changing Economy*, edited by Harry Holzer and Demetra Nightingale. Related to her current research is a forthcoming article, “Access to Elites: The Growth of Programs to Increase Opportunities for Low-Income Students at Selective Universities” (with Amanda Pallais) in *Economic Inequality and Higher Education: Access, Persistence, and Success*.

Turner has received research grants from the Andrew W. Mellon Foundation, Spencer Foundation, National Science Foundation, and Bill and Melinda Gates Foundation. She has been a visiting scholar at the Russell Sage Foundation and currently holds appointments at the National Bureau of Economic Research and the Population Studies Center of the University of Michigan.

Chair: **John T. Day**, Academic Vice President, John Carroll University

10:00–10:30 a.m.

### Refreshment Break

10:30–11:45 a.m.

### Welcome Coffee for All CAO-CFO Spouses

Room B

#### Greetings

**Richard Ekman**, President, CIC

#### Introduction and Orientation for New CAO Spouses

**Lynne Moore**, CAO Spouse, Chowan University

10:30–11:45 a.m.

Taylor 1–4

## CONCURRENT SESSIONS

### **Best Practices in Developing the Annual Budget**

The annual campus budget takes many months to develop. The degree to which different constituencies on campus contribute to the budget varies greatly from campus to campus. What role do faculty members have in the development of the budget? What perspective does the CAO bring to the process? What perspectives are typically emphasized by the CFO? How do all campus constituencies work toward the common goal of enhancing the students' experience and strengthening the institution's base of operations? A panel of CAOs and CFOs will offer examples of good budgeting practices that include shared governance, the involvement of faculty members and mid-level administrators, and an appropriate degree of transparency.

**Linda Brown**, Vice President for Finance and Treasurer, Concordia College (MN)

**Ronald L. Lostetter**, Vice President for Finance, Carroll University (WI)

**Elizabeth A. Rudenga**, Provost, Trinity Christian College

**David V. Taylor**, Provost, Dillard University

Chair: **Abiódún Gòkè-Pariolá**, Provost and Vice President for Academic Affairs, Otterbein University

Room 15

### **Creating a Culture of Retirement Incentives**

In an era of fiscal restraints, the budgetary implications of adding new programs and new faculty positions usually require the institution to shift resources among programs and to encourage timely retirements. Senior faculty members in today's economy often choose to continue in their tenured positions longer than in earlier years, a trend that strains budgets. Delayed retirements can result in lost savings that could be used for new programs and faculty positions. Participants will learn about Emeriti Retirement Health Solutions, a benefit program for colleges and universities that provides flexible solutions for repositioning cost structures while preserving retirement security across academic generations.

**June R. Aprille**, Provost, Washington and Lee University

**Kenneth E. Cool**, President, Emeriti Retirement Health Solutions

**Jeffrey M. Wolfe**, Vice President for Finance, University of Evansville

Chair: **Stuart Sigman**, Provost and Vice President for Academic Affairs, Naropa University

Harrison 1–4

### **Preventive Law I—Managing the Hiring Process**

Current economic challenges require CAOs and CFOs to think even more carefully about the legal risks campuses face when conducting searches for new faculty and staff. An attorney with experience in relevant cases will discuss best hiring practices, including drafting the position description, appointing the search committee, managing candidate files, checking references, completing background checks, and interviewing candidates on the phone and in person.

**Sidney Zonn**, Vice President and General Counsel, Robert Morris University

Chair: **Denise Doyle**, Provost, University of the Incarnate Word

Room 18

### **Tuition Discounting as an Enrollment Management Strategy**

As a tool for shaping the composition of an entering first-year class, tuition discounting is frequently part of a strategic enrollment management plan. What considerations go into setting the discount rate or is it merely the byproduct of other strategies? How does the discount rate influence the institution's operating budget? What happens when the discount rate increases at a more rapid rate than planned? What is the effect on retention? What is the effect on academic quality? Participants will learn about the advantages and liabilities of various enrollment management strategies.

**Karen Davis**, Vice President for Administration and Finance, California Lutheran University

**Jerry Forster**, Treasurer, Sewanee: The University of the South

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

Chair: **Richard Staisloff**, Vice President for Finance and Administration, College of Notre Dame of Maryland

Room 16

### **Why Linking Pedagogy to Assessment Makes Sense**

One of the challenging aspects of successful assessment of learning outcomes is completing the feedback loop. Data are often collected that do not fully demonstrate learning outcomes because the link to changes in pedagogy has not been made. The Collegiate Learning Assessment (CLA) has developed a tool, the Performance Task, that measures critical thinking skills linked to pedagogical practice. Presenters will reflect on the nature of the linkage between teaching and assessment, demonstrate how performance tasks are used, and discuss the impact of these exercises on the assessment of learning outcomes in the classroom.

**Marc Chun**, Director of Education, Council for Aid to Education

**David K. Clark**, Executive Vice President and Provost, Bethel University (MN)

**Susan Kupisch**, Vice President for Academic Affairs, University of Evansville

**Sherry McCarthy**, Vice President and Dean of Academic Affairs, William Woods University

Chair: **Charles McCormick**, Provost, Schreiner University

11:45 a.m.-1:30 p.m.

### **Free Time for Lunch**

Noon-1:30 p.m.

Adams

## **Women CAOs and CFOs Luncheon and Discussion Groups**

*(Pre-registration required)*

Coordinators:

**Andrea Chapdelaine**, Provost and Vice President for Academic Affairs, Albright College

**Barbara A. Farley**, Vice President for Academic Affairs and Dean of the College, Augsburg College

### **Welcome**

**Richard Ekman**, President, CIC

**Ginny Coombs**, Vice President for Annual Programs, CIC

### **Invocation**

**Shirley Williams**, Provost, Alvernia University

### DISCUSSION GROUPS

#### **Academic Student Success Initiatives**

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

#### **Building the Presidential Leadership Team**

**Joan Lindgren**, Provost and Vice President for Academic Affairs, Clarke University (IA)

**Deanna McCormick**, Vice President for Business and Finance, Clarke University (IA)

#### **Developing Academic Leadership Teams**

**Mary Kelly-Powell**, Vice President for Academic Affairs, Edgewood College

#### **Diversifying the Portfolio: Changes to Meet the Needs of 21st Century Higher Education**

**Judith Kirkpatrick**, Provost and Vice President for Academic Affairs, Utica College

**Laura Cassamento**, Senior Vice President and Chief Advancement Officer, Utica College

#### **Managing Change**

**Paula Smith**, Vice President for Academic Affairs and Dean of the College, Grinnell College

**Karen Voss**, Vice President for Finance and Associate Treasurer, Grinnell College

### Managing Difficult People

*Colleen Hegranes*, Senior Vice President, St. Catherine University

### Management Style

*Cheryl Clemons*, Vice President for Academic Affairs and Academic Dean, Brescia University

### Mentoring Prospective CAOs

*Carolyn Newton*, Provost, The College of Wooster

### Professional Development for CAOs

*Alzada Tipton*, Vice President for Academic Affairs and Dean of Faculty, Elmhurst College

### Mentoring Women Students

*Paula Dehn*, Vice President for Academic Affairs, Kentucky Wesleyan College

### Renewal Strategies

*Susan Traverso*, Provost and Senior Vice President, Elizabethtown College

### Strategic Alliances and Partnerships

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

### Surviving a Financial Crisis

*Mary Scott*, Provost and Executive Vice President, Concordia University (CA)

### Transitioning From One Institution to Another

*Sherilyn Emberton*, Provost and Vice President for Academic Affairs, East Texas Baptist University

### Women and the Presidency

*Patricia van der Vorm*, Senior Consultant, Academic Search, Inc.

### Working With Male-Dominated Teams

*Jamie Comstock*, Provost and Vice President for Academic Affairs, Butler University

### Prince Albert Club Luncheon for Male CAO-CFO Spouses

Noon

(Meet at CIC Registration Desk)

1:30–2:45 p.m.

Taylor 1–4

## CONCURRENT SESSIONS

### **Assuring Quality in Three-year Undergraduate Degree Programs**

The price of a four-year degree program can be an obstacle for students and their families. How can institutions assure high quality both inside and outside the classroom for students who seek to complete degrees in fewer than four years? What are the curricular, co-curricular, and financial considerations that CAOs and CFOs should explore as they assess the viability of this format? Hartwick and Manchester Colleges will share the planning processes and experiences that led to three-year degree programs at their institutions.

**George J. Elsbeck**, Vice President for Finance, Hartwick College

**Jack Gochenaur**, Vice President for Financial Affairs, Manchester College

**Glenn R. Sharfman**, Vice President and Dean for Academic Affairs, Manchester College

**Michael G. Tannenbaum**, Provost and Vice President for Academic Affairs, Hartwick College

Chair: **Betsy Fuller**, Dean of Academic Affairs, Becker College

Room 15

### **Chief Academic Officers and Chief Financial Officers “Open Mike”**

CAOs and CFOs have an opportunity to ask for advice from colleagues on specific issues and to seek information regarding trends and practices in academic and financial affairs on private college and university campuses.

**Joseph McDuffie, Jr.**, Vice President for Fiscal Affairs, Claflin University

**William F. Pollard**, Vice President and Dean of the College, Transylvania University

Room 18

### **Education for Vocation: Roles for Chief Academic Officers**

How can a focus on vocational exploration enhance and enlarge students' understanding of the liberal arts and revitalize the curriculum? CAOs from campuses participating in CIC's Lilly Endowment-supported Network for Vocation in Undergraduate Education (NetVUE) will discuss campus practices to embed vocational thinking in academic life through faculty development, curricular planning, and student advising. Panelists will address ongoing challenges in connecting vocation to educational mission as well as the CAO's role in this process.

**Ferol S. Menzel**, Vice President for Academic Affairs and Dean of the Faculty, Wartburg College

**Shirley Roels**, Senior Advisor for NetVUE, CIC

**Mark Sargent**, Provost, Gordon College

**Shirley Williams**, Provost, Alvernia University

Chair: **Robert Entzinger**, Provost, Hendrix College

### Planning for the Spatial Needs of the 21<sup>st</sup> Century Campus

What are the primary considerations in planning new or redesigned spaces? How does the strategic plan for the academic program relate to the planning process? What considerations are central to the design of new teaching spaces or a new residence hall? A CAO-CFO team and an industry expert will discuss the planning process they used to design new campus spaces.

**Donald B. Aungst**, Executive Vice President, Chief Financial Officer, and Chief Planning Officer, Upper Iowa University

**David W. Chown**, Chief Academic Officer and Senior Vice President of the Residential University, Upper Iowa University

**Brett Matteo**, Managing Director, Public Financial Management Group

Chair: **John Wells**, Vice President for Academic and Student Affairs, Mars Hill College

### Preventive Law II—Best Practices in Employee Evaluation

Current circumstances require CAOs and CFOs to think more carefully about the legal risks for campuses that accompany unacceptable behavior, poor performance, or termination of employees. In this interactive session, an experienced higher education attorney will address the legal considerations associated with these issues and provide CAOs and CFOs with the necessary tools to manage them while minimizing risk to the institution.

**Sidney Zonn**, Vice President and General Counsel, Robert Morris University

Chair: **Dennis Atherton**, Provost, University of the Southwest

### The Wabash Study: The Impact of Four Years of College

The Wabash National Study of Liberal Arts Education focuses on the formative use of evidence to promote institutional change. Data provided by participating institutions include both qualitative and quantitative assessment evidence of learning outcomes. How can such evidence strengthen institutional, course, and program elements? How are outcomes assessed? What types of changes in pedagogy and curriculum can be implemented as a result of this process?

**Charles F. Blaiich**, Director of Inquiries, Center of Inquiry in the Liberal Arts, Wabash College

Chair: **Paula Garrett**, Vice President for Academic Affairs, Warren Wilson College

### Break

3:00–4:15 p.m.

Taylor 1–4

## CONCURRENT SESSIONS

### Conflict Management Skills for Senior Officers

Department chairs are usually the front line of college leaders who are called upon to resolve conflicts between students and faculty members and between faculty members; but when the conflict is between a faculty member and a staff member in financial affairs, who resolves the conflict? What are the next steps when the first level of resolution fails and the conflict is now one for the CAO or CFO to address? What negotiation skills are needed to assist in this work? How can CAOs and CFOs recognize the tactics that others are using and respond effectively? How can negotiations move forward productively and toward positive outcomes? Participants will have an opportunity to learn new skills and practice dealing with conflict in a confidential setting.

**Claudia DeVries Beversluis**, Provost, Calvin College

**Mark J. Krejci**, Provost, Concordia College (MN)

Chair: **Daniel Taddie**, Senior Vice President for Academic Affairs and Dean of the Faculty, University of the Ozarks

Room 18

### Fundraising and the CAO

As academic programs are developed or expanded, additional resources are often needed to support them. How can the chief academic officer and the chief advancement officer work together to identify opportunities for donors? What are some examples of these funding opportunities? What is the CAO's role in developing the request? Should the CAO or even a senior faculty member be included in conversations with potential donors? Two chief advancement officers and a CAO will explore ideas about creating opportunities for donors.

**William J. Craft**, Vice President for Academic Affairs and Dean of the College, Luther College

**Keith J. Christensen**, Vice President for Development, Luther College

**Doreen Knapp Riley**, Vice President for University Advancement, John Carroll University

Chair: **Jonathan Green**, Dean of the College and Vice President for Academic Affairs, Sweet Briar College

Room 16

### Managing Faculty Compensation Frameworks

This session will focus on the information and processes available to help institutions develop better faculty compensation plans. Participants will learn about peer group selection, salary surveys, geographic and discipline differentials, and how to encourage faculty acceptance of shared governance through an actual case study of Concordia University Texas.

**Frank A. Casagrande**, Consultant, Frank A. Casagrande Consulting, LLC

**Alan Runge**, Provost, Concordia University Texas

**Phyllis Whitney**, Senior Vice President and Chief Financial Officer, Iowa Wesleyan College

Chair: **William H. Throop**, Provost and Vice President for Academic Affairs, Green Mountain College

### Redesigned Learning Spaces in Existing Facilities

The need for different types of teaching and learning spaces increases with the introduction of new pedagogies and new or expanded academic programs. How can campuses renovate existing facilities to accommodate these new needs? How is the decision made to renovate or to construct new buildings? Which campus constituencies should be involved in the decision-making process? An architect with experience in renovating campus buildings for new uses will lead a discussion with CAOs from campuses where renovations have been successfully accomplished.

**Christopher Ames**, Provost and Dean of the College, Washington College (MD)

**Lawrence Breitborde**, Vice President for Academic Affairs and Dean of the College, Knox College

**Steven M. Foote, FAIA**, Principal Emeritus, Perry Dean Rogers Partners Architects

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

Chair: **Martin Sellers**, Vice President for Academic Affairs, Cox College

Harrison 1-4

### Shared Governance: Where Does the CAO Fit In?

Because there is no uniform description of the CAO's role in shared governance—nor can there be—how do CAOs work with faculty committees? What is the CAO's role at faculty meetings? How do CAOs participate in the tenure and promotion process on their campuses? Must the CAO be a tenured member of the faculty to function effectively in campus governance? A panel of CAOs will offer insights on these topics and discuss their experiences.

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

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

**Gregory S. Mahler**, Vice President and Academic Dean, Earlham College

Chair: **Jeffrey P. Aper**, Provost, Blackburn College

4:15-4:30 p.m.

### Refreshment Break

4:30-5:30 p.m.

### CAO Mentor Program

Room 18

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

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

**Dean de la Motte**, Vice President for Academic Affairs, Salve Regina University

4:30–5:30 p.m.

Taylor 1–4

## CONCURRENT SESSIONS

### “Future Perfect” – A Strategic Planning Tool

How can the CAO and the CFO work together to generate plans for complex operations such as budget reallocation, facilities planning, projecting enrollment, and setting the tuition discount rate? There are many planning tools available to assist in this work. What are the pros and cons of some of them? A team of senior officers will demonstrate examples from their campuses using a tool, “Future Perfect,” developed by Public Financial Management Group.

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

**Brett Matteo**, Managing Director, Public Financial Management Group

**Susan Palmer**, Chief Financial Officer, College of Saint Benedict

Chair: **Arthur Hessler**, Academic Dean, Burlington College

Amphitheatre

### Is a College Presidency in Your Future?

This session provides career guidance for CAOs and CFOs who are considering the move to a college presidency. What issues should be considered? How should one prepare for future responsibilities? What are the advantages and disadvantages of making this move? What are search consultants looking for in prospective presidents? What errors do candidates often make in the search process? Spouses are welcome.

**Marylouise Fennell**, RSM, Senior Counsel, CIC

Harrison 1–2

### Professional Development Opportunities for New Faculty Colleagues

The content of orientation programs for new full-time or adjunct faculty members becomes increasingly important as institutions consider the investment they have made to attract teacher-scholars to their campuses. Beyond a campus tour, presentations about IT services, the library, completing book orders, and organizing office space, many institutions are taking the long view to assure that new colleagues are provided meaningful mentoring and professional development programs. Presenters will discuss various models of new faculty orientation programs and best practices.

**Mary Breckenridge**, Vice President for Academic Affairs, Notre Dame College (OH)

**Sara B. Varhus**, Vice President for Academic Affairs, Nazareth College

Chair: **Stephany Schlachter**, Provost, Lewis University

Room 16

### Residential Undergraduate Programs for Single Parents

Single parents who seek an undergraduate degree are frequently limited in their choice of institutions to those situated close to their place of residence. Even when students are able to commute to campus, barriers include inadequate childcare, inappropriate academic support, and the inability to participate fully in the spectrum of programming that a campus offers. Two CAOs of member campuses in the Higher Education Alliance for Residential Single Parent Programs, a coalition of colleges

and universities that offer residential degree programs for single parents, will explain how the programs provide academic support, housing and childcare facilities, and strategies to integrate students into the campus.

**Mary A. Hendrickson**, Vice President for Academic Affairs and Dean of Faculty, Wilson College

**Laura Rossi-Le**, Vice President and Academic Dean, Endicott College

Chair: **Janet Robinson**, Vice President for Academics, Lourdes College

6:15 p.m.

*(Meet in the hotel lobby.)*

### **Dine-around Dinners**

CIC arranges informal dinners at restaurants in Williamsburg to provide participants an opportunity to meet colleagues from other campuses and to exchange ideas. Conference participants are requested to sign up before 2:00 p.m. on Sunday at the CIC Registration Desk. Each group of CAOs and CFOs is guided by a CAO-CFO Task Force member.

6:30 p.m.

*(Meet in the hotel lobby.)*

### **Colonial Dine-around Dinner**

*(Pre-registration required)*

# MONDAY, NOVEMBER 8

7:00 a.m.–5:00 p.m.

*Promenade Foyer*

## CAO-CFO Institute Registration

### Idea Exchange

Display area for sharing materials with colleagues

7:30–8:45 a.m.

*Harrison 1*

### Annapolis Group Chief Academic Officers Breakfast

Members of the Annapolis Group will meet for informal discussion of current issues.

Convener: **Jonathan D. Green**, Dean of the College, Sweet Briar College

7:30–8:45 a.m.

*Harrison 2*

### Historically Black Colleges and Universities Breakfast for Chief Academic Officers and Chief Financial Officers

CAOs and CFOs will meet for informal discussion.

Convener: **Marilyn Sutton-Haywood**, Vice President for Academic Affairs, Shaw University

7:30–8:45 a.m.

*Presidents Ballroom*

## BREAKFAST DISCUSSIONS

Continental breakfast is provided to all Institute participants.

Participants may move among several of these informal discussion groups.

### As the Faculty Cohort Ages: Issues and Recommendations for Action

Baby-boomer faculty members are rapidly reaching retirement age, but many are reluctant to retire. This reluctance may mean that many younger aspiring professors will experience blocked or delayed entry into the profession and that the promotion of younger faculty members through the academic ranks will take longer. Are there positive strategies to address this challenge short of adversarial termination processes? Participants are invited to share approaches from their home institutions.

**Joseph A. Kloba**, Provost and Chief Academic Officer, Palm Beach Atlantic University

### Building Trust Between the CAO and CFO

The typical tensions that exist between CAOs and CFOs are sometimes the result of lack of information or lack of communication, but often they stem from lack of trust. Why does this lack of trust often exist? What can be done to break down barriers in order to work together smoothly? CAO and CFO participants will seek solutions to these challenges.

**Dennis G. Stevens**, Vice President for Academic Affairs, Randolph College

## **Bullies and Other Colleagues: Naming the Conduct and Changing the Game**

Armed with a clear understanding of the dynamics that drive incivility, CAOs and CFOs will have a better chance of disrupting the cycles of behavior that lead to mistreatment of certain members of a group. In this session participants will learn to identify common forms of negative, change-resistant behaviors among faculty or staff members and to formulate specific strategies for initiating positive change.

**Jeanine S. Stewart**, Vice President for Academic Affairs, Hollins University

## **Business Programs in Liberal Arts Colleges**

At small to mid-sized liberal arts colleges undergraduate business programs remain attractive options for many students. Hiring faculty members to teach in these programs may require a different salary scale in order to attract qualified candidates. Participants will share experiences and strategies for creating appropriate salary differentials.

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

## **CAO-CFO Models for Collaborative Budgeting and Marketing**

Neumann University has developed a process to facilitate integrated budgeting, marketing, and enrollment projections on a program by program basis. The CAO, CFO, deans, and directors meet annually with marketing and admissions staff to review enrollment and market trends in order to create realistic targets for each new fiscal year. The CAO and CFO of Neumann University will lead a discussion about cross-unit approaches to collaborative budgeting and marketing.

**Gerard O'Sullivan**, Vice President for Academic Affairs, Neumann University

**Joseph Gorman**, Vice President for Financial Affairs, Neumann University

## **Civic Engagement in the Curriculum**

This conversation will focus on the various ways that colleges can integrate civic engagement activities into the curriculum and use these activities to promote ethical leadership, service learning, and experiential learning. Participants will learn about the program at Peace College and offer examples from their institutions.

**Debbie Cottrell**, Provost, Peace College

## Collaborating With a Peer Institution to Develop Online Programs

Edgewood College is collaborating with Regis University to develop a plan for Edgewood's online program delivery system. This process has created an opportunity for change in many system processes that will benefit all students. The facilitators will share some of those unintended but positive consequences as well as lessons learned throughout the initial start-up phase.

**Richard J. Keintz**, Vice President, Business and Finance, Edgewood College

**Kenneth M. Macur**, Associate Dean, Academic Affairs, Edgewood College

## Communicating Effectively with *Inside Higher Ed*

The editor of *Inside Higher Ed* will discuss how the staff determines the issues to cover, news items of interest to small and mid-sized colleges and universities, and recent changes at the publication.

**Douglas Lederman**, Editor, *Inside Higher Ed*

## Creating New Academic Programs Using a Business Model Approach

In the face of new economic paradigms, the decision-making process to add new or expand existing academic programs might incorporate a business model approach to win internal and external support. This breakfast discussion focuses on a collaborative approach between financial affairs and academic affairs to facilitate success of the process.

**Sherilyn R. Emberton**, Provost and Vice President of Academic Affairs, East Texas Baptist University

## Engaging Faculty Members in Program Assessment

Adding program-level assessment projects to already crowded faculty responsibilities causes consternation among faculty members. Nonetheless, only faculty members are qualified to establish learning outcomes and assess the goals of academic programs. For this breakfast discussion participants will exchange ways to engage faculty members in program assessment that incorporate practices currently in place.

**Mary C. Draper**, Vice President for Academic Affairs, Clearwater Christian College

## Establishing and Maintaining a Positive Relationship with Regional Accrediting Agencies

Few relationships are more important to an institution than the one with the regional accreditor. The CAO plays a vital role in maintaining this relationship, which goes beyond assessment reports and enrollment figures. Participants will discuss strategies that CAOs can use to make sure this important relationship remains positive and productive.

**Andrew P. Manion**, Provost, Aurora University

## Facing CAO Challenges in Small Colleges

CAOs of small institutions (FTE < 1,000) typically carry responsibilities that elsewhere are handled by associates with specialized responsibilities—from curriculum and faculty development to institutional research to policies about faculty workload and scholarship. Participants will consider how to work effectively and efficiently with limited academic staff support.

**Malcolm B. Russell**, Vice President for Academic Administration, Union College (NE)

## Full-time or Adjunct Faculty Members: The Balancing Act

Discussion will focus on the optimal balance between full-time and adjunct faculty members as an institution grows. Are adjunct faculty members a cost-effective source of curricular sustainability? How many adjuncts are too many? How does the adjunct faculty issue relate to program quality and cost?

**Rita J. Gulstad**, Vice President and Dean of the University, Central Methodist University

## Honors Programs as Enrollment Management Tools

Attractive honors programs often function well as enrollment management tools. How are potential students identified for such programs? What curricular structures work? How do co-curricular activities enhance the experience? Participants will learn about the initiatives at Wingate University to attract first-year students.

**Martha S. Asti**, Vice President for Academic Affairs, Wingate University

## Information Fluency in the Disciplines: Moving beyond Information Literacy in the General Education Curriculum

Participants will discuss the challenges institutions face in helping students obtain a better understanding of the availability, authority, and uses of relevant information resources in their major field of study. How can administrators encourage collaboration among faculty, librarians, and information technologists to assure that students graduate with sophisticated research skills? This session may be of special interest to those from institutions that will or hope to attend one of the upcoming CIC Information Fluency in the Disciplines workshops funded by the Andrew W. Mellon Foundation, but all are welcome.

**Susanne Woods**, CIC Senior Advisor and Provost and Professor of English Emerita, Wheaton College (MA)

## International Program Planning and Budgeting

St. Lawrence University supports international study in a variety of ways: programs that are run by the institution, programs for which the institution contracts, a consortial program, summer programs, and short-term study options as part of courses. Participants will learn about managing the complexities of programs and budget and how an ongoing collaboration among the CAO, CFO, and associate dean for international education is critical for success.

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

**Kathryn L. Mullaney**, Vice President for Finance and Treasurer, St. Lawrence University

## International Recruitment of Undergraduates

The number of institutions using commission-based agencies for international student recruitment is rising rapidly, but the practice is not accepted by all institutions. CIC members with plans to internationalize their undergraduate communities are invited to discuss their experiences, concerns, and strategies.

**Richard R. Nelson**, Provost, Paul Smith's College

## Involving the CFO in Faculty Governance

Misunderstandings can occur when the CFO is perceived as an individual concerned only with the bottom line. Is there a role for CFOs in faculty discussions and on faculty committees, perhaps especially in this economic climate? Are there best practices for bringing the CFO into the academic conversation? CAO-CFO teams are encouraged to participate.

**Stephen W. Jones**, Chief Financial Officer, Hiram College

**Cheryl B. Torsney**, Vice President and Dean of the College, Hiram College

## Managing Information Technology

This session focuses on the “hows” and “whys” of shifting IT management from the CFO to the CAO and the benefits of on-campus support versus outsourcing.

**Darin Fields**, Vice President for Academic Affairs and Dean of the Faculty, Bethany College (WV)

## Mentoring Mid-level Administrators

In most institutions mid-level administrators are mentored for senior-level positions on an ad hoc or informal basis. Participants will learn about a structured program for pairing senior-level administrators with mid-level administrators to provide collegial mentoring.

**Donnie Clary**, Vice President for Business and Finance, Chowan University

**Danny Moore**, Provost and Vice President for Academic Affairs, Chowan University

## Navigating the Waters of Presidential Transition

The CAO and CFO at LaGrange College are new to their positions, as is the president of the college. Two senior officers will lead a discussion about the process of adapting to a new president and strategies for leading institutional change during a presidential transition.

**David L. Garrison**, Provost, LaGrange College

**Martin E. Pirrman**, Vice President for Finance and Operations, LaGrange College

## New CAO Workshop: Continuing the Conversation

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

**Jeffrey H. Barker**, Vice President for Academic Affairs and Dean of the School of Humanities and Sciences, Converse College

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

**Michael Le Roy**, Executive Vice President for Academic Affairs and Dean of Faculty, Whitworth University

## New Leadership Alliance for Student Learning and Accountability

The Alliance is a network and coalition of associations, organizations, and individuals that are promoting collective efforts to gather, report on, and use evidence of student learning. This session describes the Alliance and two of its initiatives, the Presidents' Alliance and institutional certification.

**David C. Paris**, Executive Director, New Leadership Alliance for Student Learning and Accountability, and Senior Advisor, CIC

## Optimal Capacity Analysis of Academic Programs

A model for determining the optimal size of a high-quality, financially sustainable academic program will be presented. Components of the model include student success, optimal class size, full-time:adjunct faculty ratio, facilities requirements, expenses, and net revenue. The Associate of Science in nursing program at College of Saint Mary will be used as an example.

**Sarah. M. Kottich**, Vice President for Finance and Administrative Services, College of Saint Mary (NE)

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

## Professional Development for New Faculty Members

Participants in this session will discuss issues related to professional development programs for new faculty members, including orientation programs, mentoring, and other forms of support for new faculty members in their teaching, research, and service roles. Participants are

encouraged to share strategies that are enhancing the experience of new faculty members at their institution and learn about what is working well at other institutions.

**Paul F. Reichardt**, Vice President for Academic Affairs, Muskingum University

### Sharing Financial Data with Faculty Members

In difficult economic times, how and how much financial data should be shared with faculty members? How can the twin dangers be avoided: (a) faculty members refusing to acknowledge the reality of economic stress and (b) reacting or over-reacting to challenges with doomsday scenarios that too often are shared freely with students? This discussion will center on strategies that can educate faculty members about financial realities and engage them in making the hard choices currently faced by many independent colleges.

**David Mowen**, Senior Vice President for Business and Finance, Mary Baldwin College

**Catherine O'Connell**, Vice President for Academic Affairs and Dean of the College, Mary Baldwin College

### Innovative Partnerships: Mergers and Acquisitions in Times of Financial Exigency

Given the current economic climate in higher education, several small colleges and universities have declared or are teetering on the brink of financial exigency. This session will explore best practices and growth opportunities for institutions considering mergers, acquisitions, or innovative partnerships resulting from the threat of financial exigency.

**Donald B. Taylor**, Provost and Vice President for Academic Affairs, Benedictine University (IL)

### Zero-based Budgeting for Dummies

With the arrival of a new president and stressful economic times, Westminster College's leaders decided to engage in one round of zero-based budgeting (ZBB) in an attempt to "right size" the budget. The CAO-CFO team from Westminster will present the details of the process to accomplish ZBB and also the preliminary results.

**Jesse T. Mann**, Vice President for Academic Affairs and Academic Dean, Westminster College (PA)

**Kenneth J. Romig**, Vice President for Financial and Management Services, Westminster College (PA)

7:30–8:45 a.m.

Room 12

SPOUSES BREAKFAST DISCUSSIONS

### Selections from Your Bookshelf

**Ann Taddie**, CAO Spouse, University of the Ozarks

### Working with Students

**Vita Viviano**, CAO Spouse, Franklin College (IN)

8:00 a.m.–5:00 p.m.

Room 5 and Room C

## CONSULTATIONS

(Sign up for all consultations at the CIC Registration Desk.)

### Planning for Your Retirement: Personal Consultations with TIAA-CREF

Representatives David Carrara and Tim Chapman will be available for consultations:

Monday, November 8, 8:00 a.m.–5:00 p.m.

Tuesday, November 9, 8:00 a.m.–Noon

8:45–9:00 a.m.

## Break

9:00–10:00 a.m.

Auditorium

## PLENARY SESSION

### Effective Collaboration Between the CAO and the CFO



**Kent Chabotar** will address the challenges of campus leadership and the nature of an effective collaboration between CAOs and CFOs in a time of continuing economic difficulties. He will provide practical ideas for building a solid relationship of mutual trust and respect through good communication and the ability to “speak” each other’s language. He will also explain, based on his own experience, how a college president

can help to build a positive relationship between these two senior officers whose blended perspectives contribute to formulating both day-to-day and longer-term solutions that strengthen the institution.

Chabotar has been president and professor of political science at Guilford College since 2002. From 1991 to 2002, Chabotar was vice president for finance and administration and treasurer at Bowdoin College and senior lecturer in the department of government and legal studies. He has served since 1983 on the faculty of Harvard’s executive programs offered by its Institutes for Higher Education. In 2003, Chabotar received CIC’s “Academic Leadership Award.”

Chabotar’s recent publications include a book on *Strategic Finance* (2006) and articles on “Coping with Financial Distress” in *Trusteeship* (2007) and “Blue Sky Thinking” in *CASE Currents* (2007). His consulting activities have focused on strategy and finance, including retrenchment. His commentaries on budget decision-making and campus communications in difficult economic times have appeared in *Inside Higher Ed* (2009), *The Chronicle of Higher Education* (2009), and *EDUCAUSE Review* (2009). He has spoken previously on economic challenges at events sponsored by CIC. He also served on the CIC Board of Directors.

Chair: **Linda Lankewicz**, Provost, Sewanee: The University of the South

10:15–11:45 a.m.

Room 12

### Open Mike for CAO and CFO Spouses

**Bonnie Lakso**, CAO Spouse, Juniata College

10:15–11:15 a.m.

Harrison 1–4

## CONCURRENT SESSIONS

### **Budgeting Instructional Costs Using CIC’s Key Indicators Tool (KIT)**

Using several of the 20 indicators provided in CIC’s Key Indicators Tool (KIT) can be helpful in calculating faculty costs and average faculty salaries against the institution’s financial resources, percentage of part-time faculty, student:faculty ratio, instructional costs per student, and overall expenditure per student. Participants will learn from actual examples how to use the KIT to enhance decision-making.

**Mark A. Matson**, Vice President for Academic Affairs and Dean, Milligan College

**Michael Williams**, President, The Austen Group

Chair: **George Miller**, Vice President for Academic Affairs, Claflin University

Taylor 1–2

### **Challenges of Implementing New General Education Programs**

Many institutions are either revising the general education program or have recently completed this work. Successful execution of this type of project includes meeting challenges such as agreement on learning outcomes and workable assessment rubrics; course redesign and appropriate faculty development resources; redesigned learning spaces; and new ways of calculating faculty members’ workloads. Two institutions in different stages in this process will share their experiences. Participants are encouraged to offer examples from their institutions.

**Iris J. Turkenkopf**, Vice President for Academic Affairs, Mount Saint Mary College (NY)

**John Yoder**, Vice President for Academic Affairs, Friends University

Chair: **Sneh Veena**, Provost and Vice President for Academic Affairs, Heritage University

Taylor 3–4

### **Developing an Online Education Initiative: Overcoming Myths and Misconceptions**

When considering the implementation or further development of an online program, institutions often face difficult choices in allocation of resources. In this session, discussion leaders with experience in online higher education will present data that dispel common misconceptions about online learning programs. Panel members will elaborate on the creation of implementation plans.

**Mac Bornhauser**, Director of Business Development, The Learning House, Inc.

**Frank D. Cheatham**, Vice President for Academic Affairs, Campbellsville University

**Paula Dehn**, Vice President for Academic Affairs, Kentucky Wesleyan College

Chair: **Richard Ostrander**, Provost, Cornerstone University

## Preparing for a Presidency

In this session participants will learn about a year-long program, “Academic Leadership for the 21st Century,” that focuses on the skills and experiences that chief academic officers should have if they aspire to become presidents and chancellors. This program was offered by CIC, American Academic Leadership Institute, and American Association of State Colleges and Universities in 2009–2010 and may be offered again in 2011–2012. What are the skills that need to be developed or strengthened? What kinds of experiential initiatives will strengthen the dossier? What are the benefits of a presidential mentor?

**Edward E. Ericsson**, Vice President for Academic Affairs, John Brown University

**Ann Die Hasselmo**, President, American Academic Leadership Institute

**Tina S. Holland**, Executive Vice President, Holy Cross College (IN)

**Leslie T. Lambert**, Provost and Vice President for Academic Affairs, Ferrum College

Chair: **Karen Gainey**, Executive Vice President and Vice President for Academic Affairs, Limestone College

## Stopping to Breathe: Renewal Strategies for CAOs

The CAO’s duties demand long hours, day after day. Just at the moment when the job almost seems manageable, a new crisis will inevitably hit the campus that requires the CAO’s full engagement. How do CAOs find time and space for personal and professional renewal? Institute participants are invited to come to this open forum to exchange renewal strategies, share experiences, and provide one another a network of support.

Moderator: **Katie Conboy**, Provost and Vice President for Academic Affairs, Stonehill College

11:15–11:30 a.m.

## Break

11:30 a.m.–12:30 p.m.

Harrison 1–4

## CONCURRENT SESSIONS

### Building Stronger Institutions Using CIC’s Financial Indicators Tool (FIT)

CIC’s Financial Indicators Tool (FIT) is a benchmarking report for member institutions that provides a vehicle for both the CAO and CFO to analyze an institution’s resources, financial health, and viability for future projects. Using FIT data to gain a solid understanding of the institution’s financial well-being will lessen the natural tension between the academic and financial perspectives on specific campus resources. Using Ripon College’s experience, participants will learn about the four ratios and the Composite Financial Index used in the FIT, how this tool can function in long-term decision-making related to enrollment, tuition discounting, spending rates, and debt and how it can be adapted to various institutional settings.

**Mary M. deRegnier**, Vice President for Finance, Ripon College

**Gerald Seaman**, Vice President and Dean of Faculty, Ripon College

Chair: **Brian Holland**, Chief Financial Officer, Oklahoma City University

### Expanding Access and Managing Growth

Effective service to a growing adult student population can be achieved through academic programs and delivery formats that meet adult students' personal lives and career objectives. Combinations of face-to-face and online formats or exclusively online delivery provide access to undergraduate degree completion opportunities and graduate degrees while managing growth and increasing capacity. Two experienced CAOs and an industry expert will share their experiences in offering programs to adult learners.

**Ann M. Heath, IHM**, Vice President for Academic Affairs, Immaculata University

**Reynold Verret**, Provost, Wilkes University

**Allyson Wells**, General Manager for Instructional Services, SunGard Higher Education

Chair: **Mary Kelly-Powell**, Vice President for Academic Affairs, Edgewood College

### Finding Resources for New Program Development

New degree programs with limited resources require more than a good idea supported by data indicating that there will be student demand for the programs. Faculty members develop the curriculum for new programs, but they, along with the CAO and CFO, often review existing programs to identify potential sources of support for new programs. How can an effective program review uncover potential funding? How can the CAO and the CFO collaborate in the program review process to create new programs? Participants will learn about the program review process from the perspective of a CAO and a CFO.

**Thomas Falkner**, Provost and Dean of the Faculty, McDaniel College

**Jeffrey B. Spear**, Vice President for Finance, Mount Vernon Nazarene University

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

### Position Descriptions for Department Chairs

The chair of a department or division is often called upon to perform several administrative roles and at the same time teach and advise students and maintain scholarly activity. A survey conducted at the 2010 CIC Workshops for Department and Division Chairs suggests that no single template can address the scope of the chair's duties or forms of compensation. Reduced teaching loads, released time for administrative duties, and stipends vary across institutions. Similarly, the chair's role in shared governance varies considerably from campus to campus. Presenters will share findings from the survey and solicit input from participants in an effort to clarify effective practices.

**Steven J. Griffith**, Senior Vice President and Academic Dean, Simpson College (IA)

**Cheryl R. Jacobsen**, Provost and Academic Dean, Loras College

Chair: **Michael B. Sperling**, Provost and Vice President for Academic Affairs, Mercy College (NY)

### Post-tenure Review and Alternative Review Models

Post-tenure review is a regular topic of discussion among CAOs on the CIC deans' listserv, partly because tenured faculty members frequently question the purpose of the review once tenure has been granted. Recent postings have described cyclical review processes as well as annual reviews. CAOs with different models on their campuses will provide insights into the purposes of post-tenure review, the benefits of cyclical review or annual review, and how the results of those reviews assist faculty members in enhancing classroom performance or reinvigorating scholarship.

**Mark J. Braun**, Vice President and Dean of the College, Augustana College (SD)

**Helen J. Streubert**, Vice President for Academic Affairs, Our Lady of the Lake University (TX)

Chair: **Paul Percy**, Vice President for Academic Affairs and Dean of the College, King College (TN)

12:30-1:30 p.m.

### Free Time for Lunch

12:30-1:30 p.m.

### Missouri Chief Academic Officers Luncheon

(Meet in the hotel lobby.)

Coordinator: **Rita J. Gulstad**, Vice President and Dean of the University, Central Methodist University

12:30-2:00 p.m.

### Women's College Coalition Luncheon for Chief Academic Officers and Chief Financial Officers

Terrace Room

(Pre-registration required)

**Susan E. Lennon**, President, Women's College Coalition

1:30-3:30 p.m.

### Open Forum with Kent Chabotar

Harrison 1-2

Chair: **Mary Jo Maydew**, Vice President for Finance and Administration, Mount Holyoke College

1:30-5:30 p.m.

### Optional Excursion—Jamestown Settlement

(Meet in the hotel lobby.)

(Pre-registration required)

2:00–5:00 p.m.

Harrison 3–4

## WORKSHOP

### Prioritizing Academic Programs and Services

*(Pre-registration required)*

The higher education landscape has changed significantly in recent years. As a consequence, institutions are seeking answers to fundamental questions about unsustainable budgeting practices, increased external scrutiny, quality, and keener competition. This workshop will be led by Robert Dickeson, whose work, *Prioritizing Academic Programs and Services: Reallocating Resources to Achieve Strategic Balance* (2010), is considered visionary. Dickeson will offer a road map to help institutions shape academic priorities through an orderly process supported by a sound conceptual framework. Participants will be encouraged to share issues from their campuses.

Topics in this workshop will include: setting priorities, reallocating resources, academic programs as the unit of analysis, identifying institutional leadership, reaffirming institutional mission, process issues, and implementing decisions.

**Robert C. Dickeson**, consultant, President Emeritus, University of Northern Colorado, and former Senior Vice President, Lumina Foundation for Education.

**J. Johann Lindig**, Principal, Academic Strategy Partners

Chair: **Michael Selmon**, Provost, Alma College

5:30–6:30 p.m.

Harrison 1

### Reception for CIC Non-member Institutions

Chief academic officers and chief financial officers of institutions that are not currently members of the Council of Independent Colleges are welcome to enjoy refreshments and learn more about CIC programs and services for members and non-members.

Convener: **Richard Ekman**, President, CIC

6:30 p.m.

### Free Time for Dinner

6:30 p.m.

*(Meet in the hotel lobby.)*

## MEETINGS OF ASSOCIATED ORGANIZATIONS

### American Benedictine Colleges Chief Academic Officers and Chief Financial Officers

Coordinator: **Diane Fladeland**, Vice President for Academic Affairs, University of Mary

Room G

### Association of Colleges of Sisters of Saint Joseph Chief Academic Officers and Chief Financial Officers

Coordinator: **Marie Harris, CSJ**, Provost and Vice President for Academic Affairs, Avila University

*(Meet in the hotel lobby.)*

### Association of Dominican Colleges and Universities Chief Academic Officers

Coordinator: **Thom Nowak**, Academic Dean and Vice President for Academic Affairs, Dominican College of Blauvelt

(Meet in the hotel lobby.)

**Association of Franciscan Colleges and Universities Chief Academic Officers and Chief Financial Officers**

Coordinator: **Christopher L. Holoman**, Provost and Vice President for Academic Affairs, Hilbert College

(Meet in the hotel lobby.)

**Association of Presbyterian Colleges and Universities Chief Academic Officers and Chief Financial Officers**

Coordinator: **Gary Luhr**, Executive Director, Association of Presbyterian Colleges and Universities

(Meet in the hotel lobby.)

**Conference for Mercy Higher Education Chief Academic Officers and Chief Financial Officers**

Coordinator: **Moya Dittmeier**, Executive Director, Conference for Mercy Higher Education

Harrison 3

**Council for Christian Colleges & Universities Chief Academic Officers and Chief Financial Officers**

Coordinator: **Mimi Barnard**, Vice President for Professional Development and Research, Council for Christian Colleges & Universities

(Meet in the hotel lobby.)

**National Association of Schools and Colleges of the United Methodist Church Chief Academic Officers, Chief Financial Officers, and Spouses**

Coordinator: **Gerald Lord**, Associate General Secretary, Division of Higher Education, General Board of Higher Education and Ministry, United Methodist Church

# TUESDAY, NOVEMBER 9

7:00 a.m.–Noon

*Promenade Foyer*

## CAO-CFO Institute Registration

### Idea Exchange

Display area for sharing materials with colleagues

7:30–8:45 a.m.

*Presidents Ballroom*

## BREAKFAST DISCUSSIONS

Continental breakfast is provided to all Institute participants. Participants may move among several of these informal discussion groups.

### Academic Program Reviews: How to Make Them Work

What are the challenges to building and sustaining an effective and meaningful academic program review process? What works? What doesn't? How do you get the faculty on board? How do you keep the process meaningful? Participants will share their experiences.

**Ann McElaney-Johnson**, Vice President for Academic and Student Affairs and Dean of the College, Salem College (NC)

### Achieving Major Reform through Campus Democracy

Over the past three years, Virginia Wesleyan College has rewritten its promotion and tenure policies using a governance system that involved the faculty, administrators, and trustees. Participants will learn how campus democracy can facilitate policy innovation.

**Timothy G. O'Rourke**, Vice President for Academic Affairs, Dean of the College, Virginia Wesleyan College

### Aligning Presidential Vocation and Institutional Mission

CIC's Presidential Vocation and Institutional Mission program is designed to assist CAOs, CFOs, and other senior administrators who are considering a college presidency—and their spouses—in clarifying their own sense of vocation and to weigh it in the context of the missions of the institutions they might lead. In this session participants will learn more about the structure of the seminars and the nomination process for the 2011–2012 program.

**Harold V. Hartley III**, Senior Vice President, CIC

### An Alternative to Tenure

Why do institutions choose to move to non-tenure systems? What are the advantages and disadvantage of non-tenure systems for faculty members, the CAO, and the institution? Participants will learn about one institution that managed the transition from a system of tenure to a multi-year contract system.

**Bettie C. Starr**, Vice President for Academic Affairs, Lindsey Wilson College

## **Bridging the Division Between Liberal Arts and Pre-Professional Programs**

A variety of rhetorical and practical strategies may be employed to bridge the reputed division between liberal arts and pre-professional programs. Participants will learn how the language of the mission statement, the general education curriculum, core courses, learning communities, and a clear articulation of the benefits of a liberal arts education help bridge the division.

**Alan F. Woolfolk**, Dean of Academic Affairs, Flagler College

## **Building Faculty Members' Trust**

Building trust is never easy, especially in a time characterized by fiscal and programmatic pruning. Since no one can lead for long in the absence of trust, how can it be cultivated and measured?

**Kent A. Eaton**, Vice President for Academic Affairs, McPherson College

## **CAOs and Fundraising: The “New Normal”**

In the past CAOs typically were not charged with fundraising responsibilities, but the situation is changing rapidly. Given the increasing demand for CAOs to become more actively engaged in external affairs and especially in fundraising, participants will discuss specific techniques for CAOs to incorporate fundraising efforts into their already demanding schedules.

**Patricia A. Lynott**, Vice President for Academic Affairs and Dean of the Faculty, Southern New Hampshire University

## **Centers for Teaching and Learning**

Centers for Teaching and Learning (CTLs) can be adapted to many different types of institutions, but they must retain their primary goal of fostering excitement for learning and improvement in teaching. Participants will discuss such questions as: How can CTLs be structured to promote excellence in teaching and learning and also to help faculty members balance the demands of teaching and research? How can this be accomplished while being sensitive to both the culture and the mission of our institutions?

**Daniel J. Blankenship**, Vice President for Academic Affairs, Saint Joseph's College (IN)

## **Creating and Sustaining Effective Honors Programs**

This session will explore the challenges and opportunities of developing new honors programs. Discussion will focus on such issues as garnering faculty and administrative support, recruiting outstanding students, fundraising and development, the relationship of the honors program to the general education curriculum, and how new honors programs can have a leavening effect on the quality of academic programs throughout the institution.

**J. Bradley Creed**, Provost and Executive Vice President, Samford University

### Developing a Good Relationship with the Board of Trustees

The CAO plays an increasingly important role as a liaison between the board of trustees and the faculty. This discussion will focus on that role and include such topics as the relationship among board members, the president, and the CAO; how to educate board members about issues in academic affairs; how to facilitate board interactions with faculty members; and meaningful engagement of the academic affairs committee of the board in academic matters.

**Williams C. Deeds**, Vice President for Academic Affairs, Morningside College

### Drinking from the Fire Hose or Trial by Fire? Orienting a New CFO

This session will focus on the initiation of a new CFO into the mysterious practices of academia and will touch on the advantages of bringing to the college campus a CFO from the world of business. The CAO and the president have a responsibility to mentor the new CFO while also learning some different ways of doing business.

**Terrence L. Grimes**, Chief Academic Officer and Vice President for Academic Affairs, Barton College

**D. Kris Lynch**, Vice President for Administration and Finance, Barton College

### Engaging Faculty Members in Budget Building

The Kalamazoo CAO-CFO team will share their institution's current budgeting model in which faculty members are heavily involved. Participants will consider the challenges of adjusting this model and how to invite others to be involved in that process of change. Discussion will focus on the strengths and challenges of various faculty engagement models.

**Michael A. McDonald**, Provost, Kalamazoo College

**James E. Prince**, Vice President for Business and Finance, Kalamazoo College

### Establishing Teaching Circles to Promote College-wide Strategic Goals

Teaching circles are often used to promote faculty development and collegiality in discussions of teaching and learning. In this session, however, participants will share ways to use teaching circles also as a means to implement college-wide strategic initiatives, particularly those that require faculty support and participation.

**Kimberly K. Estep**, Provost and Academic Vice President, Tusculum College

### Integrating Planning and Budgeting

In *Strategic Finance: Planning and Budgeting for Boards, Chief Executives, and Finance Officers* Kent Chabotar writes, "A strategy-focused organization centers its finances and other components on its

mission and goals.... A strategy-focused organization also involves its key stakeholders in the development and implementation of the strategic plan and budget.” In this session participants will discuss how campuses can be more strategic about setting new directions and priorities, leading fundamental change, and becoming more effective and efficient through integrating planning and budgeting.

**Lynn C. Etchart**, Vice President for Finance and Administration, Carroll College (MT)

**Paula M. McNutt**, Vice President for Academic Affairs and Dean of the College, Carroll College (MT)

### **Joyful Chairing: Mentoring Chairs to Mine for Joy**

This discussion will focus on how to mentor department chairs so that they see themselves as leaders of the faculty and shapers of the curriculum. How can the CAO help chairs see their role as a privilege rather than a burden that has rotated to them? Can a CAO help chairs mine for joy?

**Kina S. Mallard**, Provost and Vice President of Academic Affairs, Carson-Newman College

### **Keeping the Lines of Communication Open**

Often the CFO and the CAO have different communication styles. Participants will be invited to share the strategies they find effective in keeping communication flowing in both directions in a timely manner.

**Brian I. Erb**, Vice President for Finance, Berry College

**Katherine M. Whatley**, Provost, Berry College

### **Maintaining Identity While Implementing Online Learning at a Residential College**

Residential colleges face at least a perceived threat to their identity if they begin online programs. Are there ways to develop online programs and maintain the residential character of the college? Participants will discuss how they have dealt with resistance from faculty members and staff members in the face of the threat, perceived or real. Has faculty or staff members' opposition to online programs hindered efforts to begin a program? What should be the goals for an online program at a residential college?

**Jasper Lesage**, Provost, Northwestern College (IA)

### **Managing Data to Promote Student Retention**

Integrating academic, financial, and enrollment data is essential to projecting retention of students. This discussion will cover how the CAO and CFO at Bluefield College work together on a weekly basis to manage data in order to understand, monitor, and improve retention.

**Robert C. Shippey, Jr.**, Vice President for Academic Affairs and Enrollment Management, Bluefield College

## Managing Faculty Salary Differentials

Many CIC institutions have faculty compensation policies that do not permit disciplinary pay differentials. Others have policies that base faculty compensation, at least at the time of initial hiring, on market-based disciplinary differentials. The policy at Geneva College combines aspects of these two strategies. CAOs are invited to discuss the pros and cons of this approach.

**Kenneth P. Carson**, Provost, Geneva College

## NACUBO Benchmarking Tool

An online tool is now available to NACUBO members at institutions that participated in the 2007 NACUBO Tuition Discounting Study, the 2008 NACUBO Endowment Study, or the 2009 NACUBO Student Financial Services Survey. Participants will learn how this tool can facilitate the benchmarking process using peer institutions.

**Maryann Terrana**, Director, Constituent Programs, NACUBO

## Non-traditional Schedules

A variety of delivery formats, ranging from January-term to three-week intensive classes to two eight-week terms a semester are used at CIC institutions. Participants whose campuses are offering non-traditional academic schedules are invited to share their experiences with others interested in developing a non-traditional format.

**D'Ann M. Campbell**, Vice President for Academic Affairs and Dean of the College, Culver-Stockton College

## Planning an Off-campus Immersion with the National Park Service

Working with the National Park Service (NPS) and a nonprofit education and research entity located at the park, Unity College developed a semester-long immersion program to deliver credit-bearing coursework as well as NPS-approved law enforcement training. Discussion will focus on the financial, logistical, academic, and marketing planning and execution, as well as a “surprise” ending!

**Eileen Driscoll**, Vice President for Finance and Administration/Chief Financial Officer, Unity College

**Amy L. Knisley**, Senior Vice President for Academic Affairs, Unity College

## Programming for At-risk Students

Supporting at-risk students is a challenge for many academic institutions. Developing an enrollment and retention strategy for those students that is consistent with mission and strategic goals can be problematic when faced with financial realities. Often, at-risk students come with heightened financial, educational, and social needs. This session will involve frank discussion of first-year programs, developmental education, tutoring, parent-student support networks, and other tools used to retain students at risk.

**Bradley A. Bielski**, Vice President for Academic Affairs and Dean of the College, Thomas More College

### Scholarship of Teaching and Learning (SoTL) on a Small Campus

Funding from the Teagle Foundation is supporting development of a cost-effective SoTL Center at Juniata College. Participants will learn about successful strategies for engaging faculty members in this type of scholarship, such as bi-monthly brown bag lunches that showcase what the program has funded.

**James J. Lakso**, Provost and Executive Vice President for Student Affairs, Juniata College

### Strategic Partnerships: The Importance of Mission, Academics, and a Strong Business Plan

Elms College has developed partnerships with regional and community agencies to bring academic programs on site to area organizations. Partners include a major medical center, a community college, and an air reserve base. Discussion will focus on the academic and financial planning required to develop strong and viable partnerships.

**Walter C. Breau**, Vice President for Academic Affairs, Elms College

**Brian E. Doherty**, Vice President of Finance and Administration, Elms College

### Tenure and Promotion Appeal Processes

CAOs will have the opportunity to share tenure and promotion appeal processes and consider advantages and disadvantages of giving faculty members the right to appeal promotion decisions. Those who do not have well-articulated processes will learn from those who do.

**Sally Weaver Sommer**, Vice President and Dean of Academic Affairs, Bluffton University

### The Second Year: Pleasant Surprises and Land Mines

As last year's new CAOs move into their second year, they now have stories that may help first-year CAOs and fellow second-year CAOs be more effective in their jobs. Whether the CAOs came from inside the institution or from somewhere else, second-year CAOs have learned a few things during the year that they couldn't have known before taking the position. It's time to help each other prepare for what comes next.

**Thomas H. L. Cornman**, Academic Vice President, Cedarville University

### Transparency in the Resource Allocation Process

Discussion in this session will focus on ways in which the CAO and CFO can provide transparency in the resource allocation process to college constituencies. Lebanon Valley College uses a variety of communication and advice-seeking mechanisms that will be used as examples for the discussion.

**Deborah R. Fullam**, Vice President for Finance, Lebanon Valley College

**Michael R. Green**, Vice President for Academic Affairs and Dean of the Faculty, Lebanon Valley College

7:30–8:45 a.m.

Room 12

## SPOUSES BREAKFAST DISCUSSIONS

### **Meeting the Faculty**

**Pamla Hoadley**, CAO Spouse, Morningside College

8:00 a.m.–Noon

Room 5 and Room C

## CONSULTATIONS

*(Sign up for all consultations at the CIC Registration Desk.)*

### **Planning for Your Retirement: Personal Consultations with TIAA-CREF**

Representatives David Carrara and Tim Chapman will be available for consultations:

Tuesday, November 9, 8:00 a.m.–Noon

8:45–9:00 a.m.

## **Break**

9:00–10:15 a.m.

Room 12

## SPOUSES PROGRAM

### **Supporting Your Spouse's Work**

**Sandra Aper**, CAO Spouse, Blackburn College

9:00–10:15 a.m.

Harrison 1–2

## CONCURRENT SESSIONS

### **Cross-functional Teams in the Budget and Planning Process**

Institutions that value participatory decision-making and transparency will reflect those values when assembling the team responsible for planning and budgeting. Cross-functional teams of faculty and staff members may lead to greater “buy-in” and accountability in both the planning and budgeting processes. What are the challenges when a new framework for planning and budgeting is introduced? What are the strategies? A CAO-CFO team will share experiences.

**Paul Burkhardt**, Chief Academic Officer, Prescott College

**Steven M. Corey**, Executive Vice President, Prescott College

Chair: **Kimberly Hadley**, Vice President for Administration and Finance, John Brown University

Taylor 1–2

### **Developing a Risk Management Strategy**

Recent experience with tight budgets, changing interpretation of investment covenants, and revised terms for letters of credit have forced smaller institutions to put into place risk management strategies. What are the key components of sound strategies? How is contingency funding impacted? How do considerations about enrollment, financial aid, the need for more faculty positions, and a fluctuating endowment shape the strategy? Dominican University's senior officers will discuss the advantages and disadvantages of that institution's risk management strategy.

**Cheryl Johnson-Odim**, Provost, Dominican University (IL)

**Amy McCormack**, Senior Vice President for Administration, Dominican University (IL)

Chair: **Eric Algoe**, Vice President for Finance and Administration and Treasurer, Ohio Wesleyan University

### Equipping Students for the Future

What pedagogical considerations went into the decision to provide all students with a MacBook Pro and an iPhone or iPod Touch? How did this decision ensure that students would graduate with the technological skills that are required for their professions? Funding for this initiative required consultation and communication among the academic units and with the CFO. A CAO-CFO team will discuss the way in which academic affairs and financial affairs staff members worked together on a common vision to support teaching and learning.

**Bryon Grigsby**, Senior Vice President and Provost, Shenandoah University

**Richard C. Shickle**, Vice President for Administration and Finance, Shenandoah University

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

### Sustaining International Programs

The value of an international educational experience is usually viewed as an intrinsic component of an undergraduate degree program for students, but resource limitations often confound students' ability to participate. Many institutions offer opportunities to study abroad for a month, a semester, or a year in programs that they coordinate and staff; some institutions work within a consortium of institutions to provide students with study abroad opportunities. Central College has managed residential programs abroad for several decades. Goucher College has adopted an international experience as a graduation requirement for all students. How were these programs developed? How are costs to students kept manageable? CAOs and a CFO will address these questions.

**Robert Franks**, Interim Vice President for Academic Affairs, Central College

**W. Thomas Phizacklea**, Vice President for Financial Affairs, Goucher College

**Marc M. Roy**, Provost, Goucher College

Chair: **Joseph Dieker**, Vice President for Academic Affairs and Dean, Cornell College

### Refreshment Break

## CLOSING PLENARY SESSION

### The CAO-CFO Role in Institutional Governance

The closing plenary session will focus on institutional governance. The role of the senior leadership team, particularly the CAO and CFO, and its relationship to the board of trustees has changed significantly over the past ten years. Richard Morrill and John Walda will provide a deeper understanding of the role of governance and the relationship of boards of trustees to the increasingly complex issues faced by senior campus administrators, including budgeting, risk management, program development, enrollment, and tuition discounting. They will also explore the changes in shared governance between the faculty and senior administrators.



**Richard L. Morrill** became president of the Teagle Foundation in January 2010. He has served on the foundation's board of directors since 1989, including several terms as chair of the program committee and as chair of the board. Since 1998 Morrill has served as chancellor of the University of Richmond, an honorary position that he assumed following his ten-year presidency. At that time, he also was appointed to the Distinguished University Chair in Ethics and Democratic Values that carries his name and from which he retired in 2004. Prior to his association with the University of Richmond, Morrill served as president of Centre College (1982–1988) and Salem College (1979–1982).

Morrill has written and spoken widely on issues of values and ethics in liberal education and has published several articles and made numerous presentations on strategic planning and leadership for colleges and universities. He is the author of *Teaching Values in College: Facilitating Ethical, Moral and Value Awareness in Students* (1980), *Strategic Leadership in Academic Affairs: Clarifying the Board's Responsibilities* (2002), *Strategic Leadership: Integrating Strategy and Leadership in Colleges and Universities* (2007), and *Assessing Presidential Effectiveness* (2010).



**John D. Walda** assumed the presidency of the National Association of College and University Business Officers (NACUBO) in 2006, following a career in both public policy and law that spanned three decades. He served as president of the Indiana University board of trustees for eight years, as chairman of the Indiana Lottery Commission, as a director and chairman of the Association of Governing Boards, and as chairman of the board of Clarian Health Partners, which owns and operates the Indiana University Hospitals. He currently serves on the American Council on Education's board of directors.

Before leading NACUBO, Walda was a partner in the Bose McKinney & Evans law firm and senior vice president–federal relations for BoseTreachy Associates LLC.

Chair: **Judith Muyskens**, Provost, Nebraska Wesleyan University

# POST-INSTITUTE EVENTS

12:15–3:00 p.m.

*Terrace Room*

## CAO Task Force Meeting

1:00–5:00 p.m.

*Center Lounge*

## WORKSHOP

### CIC/Aspen/Wye Seminar on Educational Leadership in a Global Context

*(Pre-registration required)*

What do our students need to know and what do we need to teach them? In the global breadth of the 21st century, liberal education radically deepens our thoughts and broadens our cultural intelligence. In this short seminar, academic leaders will explore the place of education in a democratic republic and beyond. Classic texts from the Western tradition, together with classic texts from Africa, the Islamic world, India, and the Far East provide a framework for a collaborative dialogue about the global context of higher education and the roles of CAOs as intellectual leaders.

**David Townsend**, Director of Wye Programs, Aspen Institute, and Tutor, St. John's College (MD)

1:30–6:00 p.m.

*(Meet in the hotel lobby.)*

## Optional Excursion—Tour of Colonial Williamsburg

*(Pre-registration required)*

## Continuing Professional Education Information



At the conclusion of the 2010 CIC Institute for Chief Academic Officers and Chief Financial Officers, participants will be able to log onto “My NACUBO” at [www.nacubo.org](http://www.nacubo.org) to apply for CPE credits and print CPE certificates. CPE certificates will not be issued at the Institute. Participants will be awarded an estimated 14 CPE credits for attending the plenary and concurrent sessions of the Institute.

NACUBO is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417 or [www.nasba.org](http://www.nasba.org).

# HOTEL INFORMATION



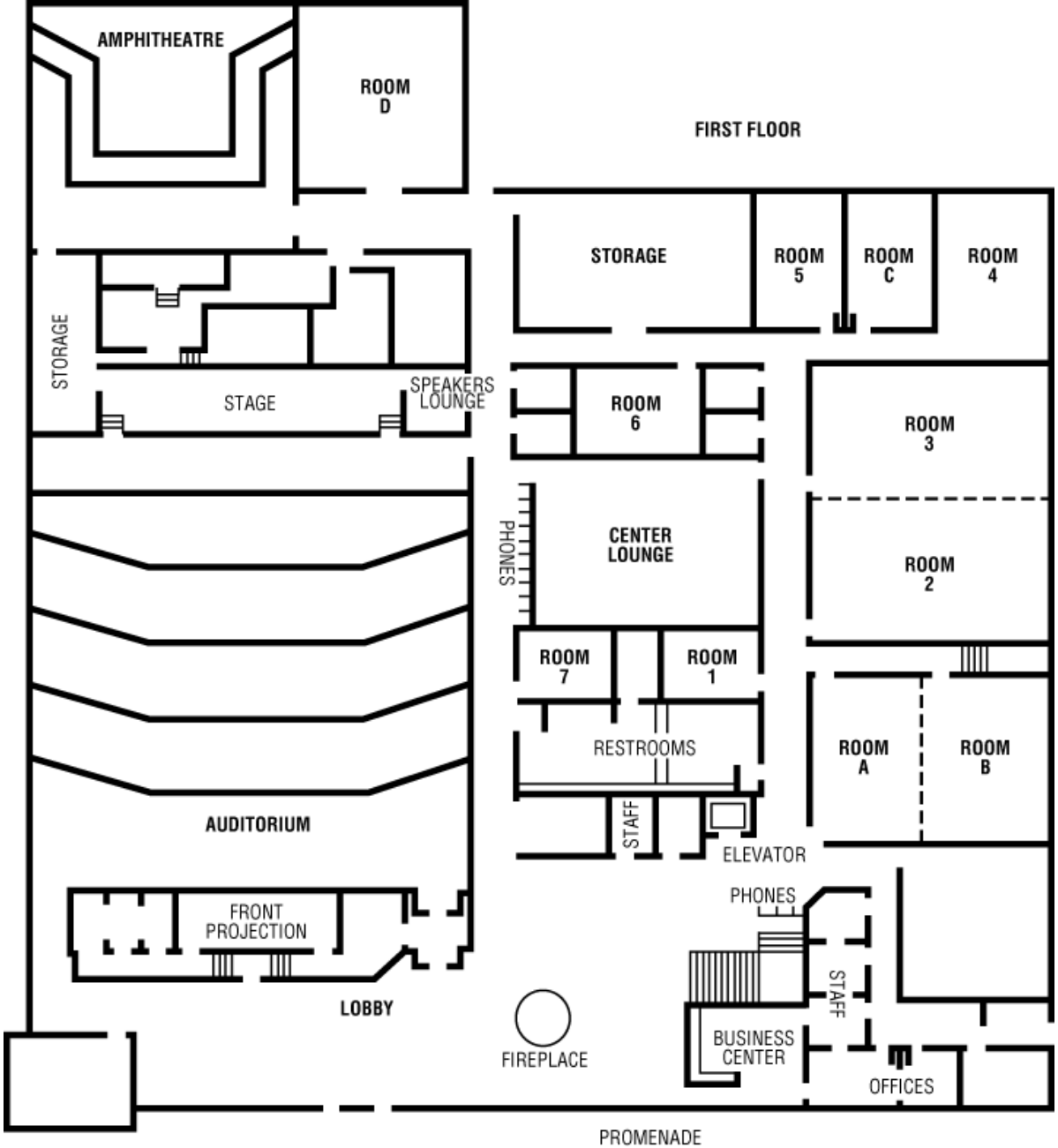
## Williamsburg Marriott Hotel

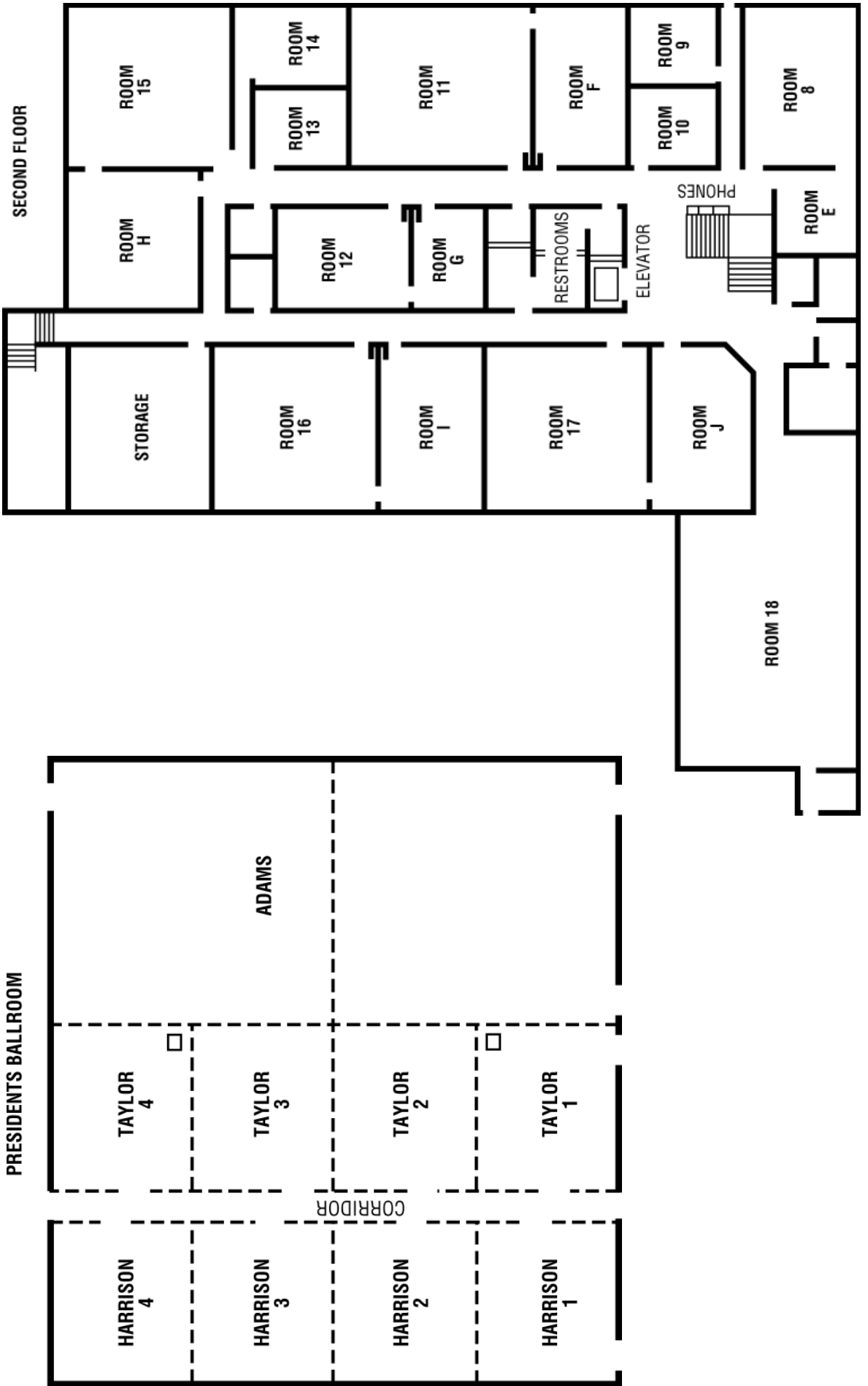
50 Kingsmill Road

Williamsburg, VA 23185

Phone: (800) 442-3654 or (757) 220-2500

Fax: (757) 221-0653





# BEST OF WILLAMSBURG

## Abby Aldrich Rockefeller Folk Art Center

The first museum in the country dedicated to American folk art is on England Street. Refurbished and enlarged in the early 1990s, this museum houses everything from stenciled coverlets to mourning pictures to paintings and sculpture. It chronicles everyday life, as many of the items were once functional. [www.history.org/history/museums/abby\\_art.cfm](http://www.history.org/history/museums/abby_art.cfm)

## DeWitt Wallace Decorative Arts Museum

Built in 1985 by world-renowned architect I.M. Pei, the museum contains one of the world's largest collections of historical American and British furniture. Its collection of British pottery is also the largest outside Great Britain. Over 8,000 decorative art pieces from 1600 to 1830 are permanently on display in the 11 galleries. Rotating exhibits are also presented, and a courtyard, café, and gift shop are located on the premises. [www.history.org/history/museums/dewitt\\_gallery.cfm](http://www.history.org/history/museums/dewitt_gallery.cfm)

## Ghosts of Williamsburg Candlelight Tour

Based on the L.B. Taylor book *The Ghosts of Williamsburg*, this tour is informative and fun! It is a walking tour of the historic area, so tourists should wear comfortable shoes. Reservations are absolutely required—about 85,000 people per year take this tour, so early reservations are advised. Tours are held rain or shine. [www.theghosttour.com](http://www.theghosttour.com)

## Muscarelle Museum of Art

Located on the College of William & Mary campus, this museum had its first painting donated in 1732 by the Earl of Burlington. The collection has grown to more than 3,000 works of art. Particularly noteworthy is the museum's collection of American and English portraits and Native American pottery. There are various events and seminars held at the museum along with rotating special exhibits. <http://web.wm.edu/muscarelle/>

## The Watermen's Museum

This museum is located in a beautiful Colonial Revival home that was floated across the York River. The museum tells the story of the Chesapeake wooden boats and the fishermen who made the most of the water's bounty. There are marvelous exhibits on the mechanics of fishing and the tools of the trade. [www.watermens.org](http://www.watermens.org)

## This Century Art Gallery

Affiliated with the Virginia Museum of Fine Arts, this gallery is free to the public and carries many traveling exhibits from Richmond. The museum showcases regional artists and is heavily involved in the local art scene at the College of William & Mary and in the community. [www.thiscenturyartgallery.org](http://www.thiscenturyartgallery.org)

## Williamsburg Winery, Ltd.

A 320-acre farm, this property is called Wessex Hundred. The farm dates back to 1616. The modern day vineyards were planted in 1985, bringing a harvest in 1988. Today, over 65,000 cases of wine are produced each year. Chardonnay, Seyval Blanc, Cabernet Sauvignon, Vidal, and Merlot are among the types of wine produced. A visit to the winery includes a 10-minute video, a guided tour, and a wine tasting. After tasting seven different wines, guests are sent home with a complimentary monogrammed wine tasting glass. [www.williamsburgwinery.com/index-hs.htm](http://www.williamsburgwinery.com/index-hs.htm)

## Yorktown Victory Center

The Revolutionary War ended with the Battle of Yorktown in October of 1781, and the event is commemorated at the Victory Center. Inside exhibits take visitors through the war. The outdoor re-enactments depict farm life in the 18th century. This is not a place to rush through but to savor the experience of what it must have been like for inhabitants of Tidewater Virginia. [www.historyisfun.org](http://www.historyisfun.org)

# CHIEF ACADEMIC OFFICERS AND CHIEF FINANCIAL OFFICERS TASK FORCE

The program of the 2010 Institute for Chief Academic Officers and Chief Financial Officers was planned with the assistance of CIC's CAO/CFO Task Force:

**Rita E. Knuesel**, Provost, College of Saint Benedict/Saint John's University (*Chair*)

**Jeffrey Aper**, Provost, Blackburn College

**Donald Aungst**, Executive Vice President, Chief Financial Officer,  
and Chief Planning Officer, Upper Iowa University

**John T. Day**, Academic Vice President, John Carroll University

**Linda Lankewicz**, Provost, Sewanee: The University of the South

**Ronald Lostetter**, Vice President for Finance, Carroll University (WI)

**George E. Miller**, Vice President for Academic Affairs, Claflin University

**Judy Muyskens**, Provost, Nebraska Wesleyan University

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

**Daniel Taddie**, Senior Vice President for Academic Affairs  
and Dean of the Faculty, University of the Ozarks

**Sneh Veena**, Provost and Vice President for Academic Affairs, Heritage University

**Phyllis Whitney**, Senior Vice President, Iowa Wesleyan College

The Spouses Program of the 2010 Institute for Chief Academic Officers  
and Chief Financial Officers was planned with the assistance  
of CIC's 2010 CAO Spouses Task Force:

**Sandy Aper**, Blackburn College

**Sharon Day**, John Carroll University

**Heidi M. Finley**, Trine University

**Bonnie Lakso**, Juniata College

**Lynne Moore**, Chowan University



# THE COUNCIL OF INDEPENDENT COLLEGES

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