



*All times listed are Eastern Daylight Time (US & Canada)*

## Full Program

*\*As of July 7<sup>th</sup>, 2023. Subject to change*

Sunday, July 16

**10:00 AM – 5:45 PM**

### **Conference Registration**

*Location: West Promenade*

Welcome to New York! Stop by the registration desk at 10:00 AM to check in and pick up your conference materials.

**1:00 – 2:30 PM**

### **Welcome and Opening Key Sessions**

*Location: Grand Ballroom*

This year we are putting your feedback into action and are shaking things up at the CASE Leadership Summit! Since two is always better than one in the world of advancement, we are thrilled to bring you an exciting double-header for our opening session.

Our surveys are always filled with comments about the value of the connection and conversations that emerge when we are together. To open this session, we have invited Chad Littlefield, bestselling author of *Ask Powerful Questions: Create Conversations that Matter*, to kick off the conference with an engaging and thoughtful connection experiment. He will also be joining us throughout the summit to facilitate creative and thoughtful conversations and meaningful interactions.

Following Chad, Daniel Pink, international bestselling author of *Drive*, *To Sell Is Human*, and *The Power Of Regret*, offers some answers on how to navigate what's next for higher education. From deepening political turmoil to rising artificial intelligence, the world of higher education has never been more tumultuous. How can key decision-makers in fundraising, alumni relations, and communications and marketing navigate

this new terrain? In this entertaining and provocative session, Dan will offer an array of specific, actionable tips to help you find your footing and inspire you to work smarter and better.

Speakers: **Daniel Pink**, Author; **Chad Littlefield**, Co-Founder and Chief Experience Officer, We and Me, Inc.

**2:30 – 6:45 PM**

**Marketplace Hours**

*Location: America's Hall 1*

**2:30 – 3:00 PM**

**Marketplace Opening and Book Signing**

*Location: America's Hall 1*

**3:00 – 4:15 PM**

**Key Sessions with Aiko Bethea: A Future-Ready Advancement Leader**

*Location: Grand Ballroom*

The working landscape in 2023 is dramatically different than it was when today's leaders were beginning their careers. The speed of innovation alone requires many of us to adapt in ways our mentors were not able to prepare us for. We are reminded of ongoing change almost daily while leading colleagues from multiple generations who have very different life and workplace experiences from our own. Key to being able to unlock the potential of ourselves and our teams is to dial into and grow our individual skillsets of empathy and self-awareness.

Speaker: **Aiko Bethea**, Founder, RARE Coaching & Consulting

**4:15 – 4:45 PM**

**Coffee Break in Marketplace**

*Location: America's Hall 1*

**4:45 – 5:45 PM**

**Elective Sessions (choose one):**

- **"Telling your Story" Is Not a Strategy**

*Location: Morgan*

In the past five years, the number of institutions with marketing and communications leaders that sit on the university cabinet or report directly to the institution's president has grown by more than 30 percent. There is a good

reason for this positive development. As the author of *How to Market a University* Terry Flannery explains, "marketing strategy must mirror institutional strategy".

In recent times, institutions have been challenged by significant marketing problems including poor public perceptions of higher education, questions about the value proposition for parents and students, brand management through mergers and acquisitions, digital marketing and marketing technology growth, brand and the customer experience, transformational state investments and political challenges, athletic issues, and more. Leading your institution to success requires both institutional focus and commitment, as well as leaders who know that institutional challenges require more than a good story.

Learning Objective 1: How to build a case for support among university leadership using industry trend data around the maturation of marketing and branding organizations and leadership.

Learning Objective 2: Awareness and understanding of new research on public perceptions of higher education including an interesting disconnect between how alumni opinions of their own experience differ from a broader decline in public trust.

Speaker: **Jason Simon**, CEO, SimpsonScarborough

- **10 ways AI will change advancement**

*Location: Murray Hill Suite*

Artificial Intelligence (AI) is transforming how we work, live, and learn. In this session, we will explore how for-profit industries have embraced AI and how advancement teams can learn from their experience. We will elaborate on the ways AI will fundamentally alter fundraising by enhancing efficiency, streamlining donor engagement, lowering costs, and giving institutional leadership real-time insights for better decision-making. Using case studies from institutions at the forefront of leveraging AI in their philanthropy efforts, we will highlight best practices and use real-world examples to demonstrate how AI is beginning to help universities identify and prioritize prospects, increase gift revenue, and ultimately build better donor and alumni relationships. And, we will discuss the challenges and ethical considerations that come with integrating AI into advancement for higher education.

(Thanks to ChatGPT, the AI-driven natural language processing tool, which helped write this session description.)

Learning Objective 1: Increase understanding of how AI will support the efforts and effectiveness of your advancement operations and learn how to begin leveraging AI for prospect discovery and one-to-one donor engagement.

Learning Objective 2: Increase awareness of the ethical and data implications of embracing AI for fundraising in higher education.

Speakers: **Armin Afsahi**, Vice President for Alumni Relations and Development, University of Chicago; **Brent Grinna**, Founder & CEO, EverTrue

- **Shared Equity Leadership: Working Collaboratively to Achieve Priorities**

*Location: Nassau Suite*

The American Council on Education, in partnership with the University of Southern California, produced a series of reports that provide critical information for understanding, implementing, and being successful in Shared Equity Leadership. As we know, institutional transformation occurs when leadership emphasizes the critical role of centering equity as a priority and connecting practices to structures and processes, especially during times of uncertainty. Shared equity leadership provides advancement leaders a unique opportunity to scale their equity work by organizing teams across the division to take collective responsibility for developing and moving diversity and inclusion priorities forward. This session will describe how Brown University's Advancement Division pivoted when our nation faced a worldwide health crisis and organically applied shared equity leadership to achieve its diversity and inclusion fundraising priorities and goals.

Learning Objective 1: Assess the needs of your division, opportunities for collaboration, and identify who will take responsibility for the collective work.

Learning Objective 2: Establish a process to move goals forward and evaluate how to improve and elevate projects.

Speakers: **Alyssia Coates**, Senior Director of Development, Inclusion Philanthropy and Engagement, Brown University; **Sergio Gonzalez**, Senior Vice President for Advancement, Brown University

- **Women's Philanthropy Principles in Practice**

*Location: Gramercy Suite*

Philanthropically engaged women have swagger, invest for impact, and expect to be in dialogue with your institution. Colleges and universities that have focused on women's engagement and giving are experiencing huge wins. Women historically build community, collaborate, and care about the welfare of others. Understanding these characteristics and motivations are part of the key to unlocking the potential impact women's philanthropy can have on your institution. This panel of experts with perspectives grounded in research will share how they have applied the principles of successful women's philanthropy to increase engagement and giving at their institutions. Women have tremendous resources and are poised and ready to be influential, strategic, and engaged investors for your institution. Join us to learn how to position your shop for successful engagement with this critical group of stakeholders.

Learning Objective 1: Upon completion participants will deepen their understanding of the philanthropic motivations and unrealized impact of women that could be applied to their university advancement programs.

Learning Objective 2: Upon completion participants will gain insight into the invisible and unintentional barriers that inhibit or neglect to maximize women's giving.

Speakers: **Cannie Campbell, MPH, MA/EdS**, Associate Vice President for Constituent Engagement, James Madison University; **Val Cushman**, Senior Director, Alumni Engagement & Inclusion Initiatives, The College of William & Mary; **Carol Ann Packard**, Associate Vice President, Alumni Affairs and Development, Cornell University; **Sallie-Grace Tate, M.A. Ed.**, Executive Director, Women & Philanthropy, UC Davis; **Jessie Brooks**, Vice President, Institutional Advancement, Spelman College

**5:45 – 6:45 PM**

**Welcome Reception**

*Location: America's Hall 1*

Monday, July 17

**7:00 – 7:30 AM**

## **Community Connection: Mindful Movement**

*Location: Nassau Suite*

Mindful Movement is a powerful, easily accessible 30-minute practice to jumpstart your mornings and integrate as an energy- and creativity-boosting break in your workday. It combines a trio of tools to unlock workday flow: simple breathing techniques, yoga-inspired movement you can do from your desk and almost anywhere; and a short awareness- of- breathing meditation to ground you and sharpen focus.

Join in the fun Monday morning (no props required!) and carry home a new toolkit to help your teams thrive. Our instructor, Mary Beth Knight, is the Executive Director of Foundation Relations and Industry Engagement at the University of North Carolina at Chapel Hill. She is a 200-hour certified yoga instructor, has completed training in mindfulness-based stress reduction, and is studying to become a certified leadership and executive coach rooted in the science of positive psychology. She enjoys sharing these skills with higher education leaders and leadership teams to build resilience in campus communities.

**7:30 AM – 5:00 PM**

### **Registration Hours**

*Location: West Promenade*

**7:30 – 8:30 AM**

### **Breakfast in the Marketplace**

*Location: America's Hall 1*

**8:30 – 9:30 AM**

### **Key Session: From the Leadership Perspective**

*Location: Grand Ballroom*

Advancement is a strategic function that creates and moves forward connections between the institution and its constituencies. In order to do that well, advancement leaders must understand how institutional leaders think about their own work – and how they focus on the future in the midst of challenge and change. In this plenary session, CASE President and CEO Sue Cunningham will engage with educational leaders around those very themes: leadership, personal growth, and leading while every eye is focused squarely on the institutional leader.

Speakers: **Baroness Minouche Shafik**, President, Columbia University in the City of New York; **Ted Carter, Jr.**, President, University of Nebraska; **Sue Cunningham**, President and

CEO, Council for Advancement and Support of Education, US; **Wayne Frederick**,  
President, Howard University

**9:30 – 10:15 AM**

**Break in Marketplace**

*Location: America's Hall 1*

**10:15 – 11:15 AM**

**Elective Sessions (choose one):**

- **From Presence to Future: Empowering Your Leadership from Mindfulness**

*Location: Gramercy Suite*

The value of mindfulness techniques to personal well-being is well known. But increasingly, these practices are being adopted for leadership development and teams. While most techniques teach us to center ourselves in the present, they can also be powerful tools to help us create the right conditions for developing our future.

In this session, the presenter will combine her experience in education advancement with her training as an ontological coach and her own journey as a leader. You will understand how mindfulness techniques can help you to be a better leader, empower your teams and colleagues, and create the optimal conditions for creating and implementing your advancement strategies. You will leave this session with a toolkit of techniques that you can use for yourself and with your colleagues right away, helping you to channel your team's energy where it is most needed.

Learning objective 1: Understand the relevance and techniques of mindfulness for leadership.

Learning objective 2: Become intentional about "being" not just "doing" in order to create powerful conditions for a successful advancement strategy.

Speaker: **Tracy Playle**, CEO and Chief Content Strategist, Pickle Jar Communications, ContentEd, UK

- **Leading During Unimaginable Times**

*Location: Morgan*

In the last 15 years, many campuses have experienced the tragedy of mass violence. From Virginia Tech to Michigan State, violence has claimed the lives of many students, faculty, and staff. Unfortunately, emergency incident preparation and crisis response are painful realities of educational institutions today. In the wake of a crisis, students, alumni, parents, faculty, staff, and members of the community contact the campus through all channels, asking questions, offering support, and sharing their concerns and sadness.

As advancement leaders, we may be the face of the university and champions of our institutions. Whether leading the communication strategy, or being the first person contacted by a parent, an alumnus, or a stakeholder, we must be prepared to respond during unimaginable circumstances. In this session, pairs of leaders from three institutions will provide examples, advice, and lessons learned from their own experiences to help your staff prepare for a tragedy on your campus.

Learning Objective 1: Understand how to respond if you are struck by tragedy on your campus and demonstrate where to turn for support.

Learning Objective 2: Learn what or how to communicate with the constituents who will reach out and those who will expect to hear from you.

Speakers: **Teresa Valerie Parrot**, Principal, TVP Communications; **David Bennett**, Senior Vice President of Development and Alumni Relations, Howard University; **Marcus Lyles**, Executive Director of Campus Safety and Chief of the Howard University Police Department, Howard University; **Heather Swain**, Vice President for Marketing, Public Relations, and Digital Strategy, Michigan State University; **Vennie Gore**, Senior Vice President, Student Life and Engagement, Michigan State University

- **Research Symposium Part I**

*Location: Nassau Suite*

Presented by CASE and GG+A, the Research Symposium will feature three leaders in higher education who will examine the academic literature from a personal and professional view, helping us understand what we can learn about what traits make leaders most effective, navigating transitions at your institution and how you can work to develop a strong pipeline for leadership. Part I will include leaders discussing the literature.



Speakers: **Sue Cunningham**, President and CEO, Council for Advancement and Support of Education, US; **Deep Saini**, Principal and Vice-Chancellor, McGill University, CASE Trustee; **Maurie McInnis**, President, Stony Brook University; **Javaune Adams-Gaston**, President, Norfolk State University

- **The Five-Generation Challenge: Galaxy-Brain Your Audience Strategy**

*Location: Murray Hill Suite*

Higher education leaders today must successfully connect with the Silent Generation, Baby Boomers, Gen X, Millennials, and Gen Z all at once. While individuals who share an alma mater will also share many common ideals, they can be worlds apart in the ways they connect with their institutions. Meanwhile, stereotypes muddy the waters. We'll share usable insights about the actual—sometimes surprising—behaviors, preferences, values, and platforms of choice of generational cohorts and subsets, drawing on an ever-evolving AI-driven insights tool reflecting the views of 230 million consumers. And we'll share a look at comparable insights extracted specifically for one of the country's largest public research institutions, illuminating nuances and variations that go beyond generational differences.

Learning Objective 1: Differentiate between challenges of framing or positioning and challenges rooted in true generational divides and replace inherited notions about generational behaviors with up-to-date insights based on real data

Learning Objective 2: Understand options for developing and customizing data-informed audience targeting strategies and messaging toolkits

Speakers: **Colleen O'Grady**, Vice President, Philanthropic Strategy, Yes& Lipman Hearne; **Andrew Teie**, VP of Brand Strategy & Customer Experience, Yes& Agency

**11:30 AM – 12:30 PM**

**Elective Sessions (choose one):**

- **Navigating Complex Crises: A Personal and Institutional Journey**

*Location: Morgan*

Staying hopeful during challenging times can be tough. Based on the presenter's personal and professional experience, this session will address recent ordeals that tested him and the struggles he encountered. Inspired by his conversation with the "Leading Through Crisis" panel for the recently published book, *Global Exchange: Dialogues to Advance Education*, we will discuss personal and

institutional crises, what can be learned from them, and how to continue moving forward in the face of adversity. Based on a crisis typology utilizing personal, institutional, national, and global perspectives, we will share actionable items we can all use to weather the storm and help navigate complex crises. This session is highly interactive and focuses on interpersonal learning. Please be prepared to briefly share your own crisis response story.

Learning Objective 1: Understand how leaders across the university tackle personal and institutional crises by using actionable steps to navigate the situation.

Learning Objective 2: Learn about crisis typology including the Black Swan theory.  
Speaker: **Serge Sych**, Vice President, Stakeholder Engagement, Corvinus University of Budapest

- **One University, One Brand: The Impossible Dream or Inevitable Reality?**

*Location: Murray Hill Suite*

One university, one brand, one vision, one voice -- we hear this expectation from university leadership more frequently every day. Given the current competitive environment for students, philanthropic support, and talent, colleges and universities cannot afford to operate in siloed structures of the past. We live in a new world of educational options and competing philanthropic causes. As a result, our institutions should be working from a unified approach and speaking with one voice. But most universities are not practicing this marketing strategy.

During this session, the benefits of intentional institutional unity will be debated and discussed by a panel of experts from higher education marketing, communications, and advancement and facilitated by an external agency leader. The panel will share opinions, examples, and insider perspectives from their institutions to help participants understand and address this key issue.

Learning Objective 1: Understand how leaders across the university work together to engage and advocate for an aligned brand voice and experience from their vantage point. Hear examples from schools on the path to understanding and addressing this key issue.

Learning Objective 2: Break down silos that exist among key stakeholders and

communication groups to help higher ed compete in this new world of educational options and competing philanthropic causes.

Speakers: **Bill Faust**, Senior Partner, Chief Strategy Officer, Ologie; **Julie Flory**, Vice Chancellor for Marketing and Communications, Washington University in St. Louis; **Erika Jordan**, Vice President, Alumni Engagement, Boston University; **David Wu**, President, Baruch College

- **Research Symposium Part II: The Future of Leadership in Education**

*Location: Nassau Suite*

Presented by CASE and GG+A, the Research Symposium will feature three leaders in higher education who will examine the academic literature from a personal and professional view, helping us understand what we can learn about what traits make leaders most effective, navigating transitions at your institution and how you can work to develop a strong pipeline for leadership. Part II is an interactive, moderated discussion that will further explore how the highlighted academic research translates to the institution.

Speakers; **Liesl Elder**, Chief Development Officer, University of Oxford; **Deep Saini**, Principal and Vice-Chancellor, McGill University, CASE Trustee; **Maurie McInnis**, President, Stony Brook University; **Javaune Adams-Gaston**, President, Norfolk State University

- **U.S. Supreme Court Ruling on Affirmative Action – What Now and What’s Next?**

*Location: Gramercy Suite*

In June 2023, the U.S. Supreme Court will rule on the continued use of race conscious admissions policies at colleges and universities. The ruling has the potential to significantly alter the admissions landscape, with implications for advancement practices as well. By the time of the Summit, the ruling will be handed down, and institutions will be considering how to adapt practices and respond to their communities.

A panel of experts will cover:

1. The issues at play in Students for Fair Admissions vs. President and Fellows of Harvard and Students for Fair Admissions vs. University of North Carolina
2. The legal implications of the Court’s ruling on admissions and financial aid policies, including scholarships and legacy admissions

3. Considerations for communication with stakeholders and community members about the ruling's impact on institutions and ways to ensure that communications align with their institution's mission and values.

4. The importance of leaders working closely together to collaborate on institutional response.

Speakers: **Vern Granger**, Director, Undergraduate Admissions, University of Connecticut, Board Chair, National Association of College Admission Counseling (NACAC); **Ishan Bhabha**, Partner, Jenner & Block; **Alonda Thomas**, Chief Communications Officer and Associate Vice President for Marketing and Communications, Jackson State University; **Kevin Heaney**, Vice President for Development, Princeton University

**12:30 – 1:45 PM**

**Community Connection Lunch & Conversation**

*Location: Grand Ballroom*

**2:15 – 3:15 PM**

**Elective Sessions (choose one):**

- **Fundraising Challenges and Expectations Facing University Presidents**

*Location: Morgan*

Only 4% of new college and university presidents advance to leadership from full-time advancement roles, yet many college presidents report that fundraising is one of their top priorities and consumes a significant amount of their time and energy. Based on the presenter's recently-published doctoral dissertation and the personal experience of one new college president, this session will explore fundraising challenges and expectations that first-time college and university leaders face upon assuming the presidency.

This qualitative, multiple case study analysis was built on in-depth conversations with six presidents serving in their first presidential roles. The study explored how prepared the participants felt for fundraising work and expectations, how they engaged with their professional advancement staff in their pursuit of fundraising outcomes, how they overcame the fundraising experience gap, and what drove them to work hard at fundraising. This session will explore the answers to these questions and provide a summary of findings from this study.

Learning Objective 1: Better understand how the president/CEO perceives the

need for fundraising within your organization.

Learning Objective 2: Envision ways in which you can make your working relationship and framework for collaboration with your president/CEO more effective.

Speakers: **Jesse Pisors**, Vice President for University Relations & Advancement, Texas A&M University-San Antonio; **Jennifer Kent**, President, Victoria College

- **How to Build Fundraising Momentum When Fundraisers are Scarce**

*Location: Gramercy Suite*

Almost all universities face staffing and talent challenges in today's post-pandemic climate, but smaller institutions in rural areas or smaller towns and cities are at an even greater disadvantage when it comes to recruiting and retaining the talent needed to drive successful, institutional fundraising programs.

During this panel, advancement leaders from Union College in Kentucky, Bennett College in North Carolina, and Northern Kentucky University will discuss the challenges and opportunities faced by institutions outside of major city centers, and the creative solutions to staffing that have allowed them to build and maintain fundraising momentum amidst the talent crisis. We will elaborate on key tactics for amplifying the success of small teams using technology and senior leadership involvement, as well as tools for accelerating the cultivation and solicitation process when working with a smaller advancement team.

Learning Objective 1: Better understand the challenges faced by institutions outside of major metro areas to attract and retain talent.

Learning Objective 2: Learn key tactics for amplifying success of small and changing teams, with technology and by senior leadership intervention.

Speakers: **Greta Daniels**, Senior Vice President, Ruffalo Noel Levitz; **Marcia Hawkins**, President, Union College; **Suzanne Walsh**, President, Bennett College; **Rebecca Kocher**, Vice President for Advancement and Alumni Engagement, Wittenberg University

- **Leadership at Its Best: Turning Poly-Crisis into Strategic Advantage**

*Location: Nassau Suite*

The world has changed, and the education industry is facing an uncertain future. The political, social media, environmental, and macroeconomic environments are increasingly turbulent in what is best described as a polycrisis: Multiple crises happening simultaneously in which the whole is even more dangerous than the sum of the parts. This evolving landscape creates new business risks that educational leaders must address. Through this session, we will inspire leaders to convert the challenges of a polycrisis into a strategic advantage for their institutions.

We will discuss three critical challenges currently facing the education industry: The education workforce, effective constituent engagement, and diversity, equity, inclusion, and belonging (DEIB). You will gain insights to better navigate this polycrisis, tools to build your leadership capacity in managing it, and strategies to tackle the complex risks related to these challenges. You will also walk away with a plan to turn this polycrisis into a strategic advantage by drawing on the full range of advancement expertise at your institutions, including communications, marketing, alumni relations, fundraising, and data services.

Learning Objective 1: Articulate and implement an employee value proposition to improve workforce retention and culture

Learning Objective 2: Create better constituent feedback mechanisms to drive data-informed decisions and change

Learning Objective 3: Optimize a high sense of community belonging so DEIB becomes a clear and visible institutional imperative

Speaker: **Scott Erickson**, Head of School, Phillips Brooks School

- **Let's Get Real: Discussing Talent Engagement for a Successful Culture!**

*Location: Murray Hill Suite*

Join us to engage in an authentic and vulnerable dialogue among leaders that will empower you to reframe the conversation and strategy around talent management toward a culture of retention and talent engagement. Structured for group coaching, feedback, and best practice sharing, this session will provide an interactive approach and participants will walk away with tactical steps you can successfully implement at your institution. We will tap into our own emotional intelligence with key thought-provoking topics for leadership roundtable

conversations within your organization. We will focus on the need for employee engagement roles and programmatic initiatives as part of your organization's culture resulting in successful and achievable talent engagement.

Learning Objective 1: Learn resources and strong data points (from Gallup research and resources) to help guide participants through the initial process of strategic planning templates, dashboards, and employee engagement metrics.

Learning Objective 2: Identify and prioritize the best strategies to influence the changes needed to improve employee engagement and foster a culture of retention, with the intention of empowering their staff and administration with a vision and a business case as to why this mindset shift is needed.

Speakers: **Sue Ballard**, Associate Vice President, Employee Engagement and Advancement Operations, Rensselaer Polytechnic Institute; **Emili Bennett**, Vice President, Leadership Development, Bryant Group

### **3:15 – 3:45 PM**

#### **Coffee Break in Marketplace**

*Location: America's Hall 1*

### **3:45 – 4:45 PM**

#### **Trends in College and University Rankings**

*Location: Grand Ballroom*

If you ask a law or medical school dean at a U.S. university about rankings, prepare to hear delighted predictions for their imminent demise. But you might hear an entirely different view from a liberal arts college president or a university vice chancellor in Europe. Ask marketing and admissions colleagues who are responsible for international recruitment, and you will hear that in parts of the world, rankings and league tables are more important than ever. Institutional research offices dedicate resources to data submission and strategy. Chief Marketing Officers and reputation managers mark their calendars to plan for release dates so they can leverage or mitigate the impact on reputation. Alumni, donors, and trustees love them when they are up, and bring concerns when they are down.

So, what sense do we make of recent headlines? What value do rankings hold for presidents, institutional planners, and reputation managers and how do they influence institutional strategy? How do advancement leaders spot future trends? Which rankings

are important to which audiences? In this session, we'll invite advancement professionals and representatives of the leading global rankings sources to share their perspectives, to sort the signals from the noise and anticipate trends for which leaders should plan.

Speakers: **Jane Chafer**, Vice President, Membership, Marketing and Communications, CASE; **Germán Campos Valle**, Director of the Anáhuac Social Foundation, Universidad Anáhuac México; **Brian Kelly**, Editorial Director and Executive Vice President, U.S News & World Report; **Leigh Kamolins**, Director of Analytics and Evaluation, QS

**4:45 – 6:00 PM**

**Marketplace Reception**

*Location: America's Hall 1*

Tuesday, July 18

**7:30 – 8:30 AM**

**Breakfast in Marketplace**

*Location: America's Hall 1*

**7:30 – 10:00 AM**

**Marketplace Hours**

*Location: America's Hall 1*

**8:30 – 9:30 AM**

**Elective Sessions (choose one):**

- **Intercollegiate Athletics at an Inflection Point**

*Location: Murray Hill Suite*

Name, Image, and Likeness and conference realignments are just two of the signals that collegiate athletics is shifting rapidly and seems at a pivotal moment. For many schools and universities, athletics play a key role in strategies for recruitment, advancement, and reputation management. Dr. Karen Weaver, University of Pennsylvania faculty member, author, and expert on the intersection of collegiate athletics with management, media, finance and policy, teaches leaders--from presidents and trustees to executive teams and faculty scholars--about athletics. Join Weaver, and a group of advancement and athletics professionals to understand recent shifts and future trends.

Speakers: **Karen Weaver**, Graduate Faculty, Higher Education, University of Pennsylvania; **Colin Hennessy**, Vice President for Alumni and Donor Engagement,



The University of Iowa Center for Advancement; **Ronald Gray**, VP of Student Affairs, Manhattan College; **Irma Garcia**, Athletics Director, Manhattan College

- **Traversing the Uncomfortable: Protecting Advancement Staff From Harassment**

*Location: Gramercy Suite*

Globally, sexual misconduct and harassment in the workplace have become critical, public topics of conversation. Although our culture is changing, resulting in safer, more positive work environments, problems persist. The advancement profession is no exception. Sexual misconduct and other forms of harassment have been a part of our industry for years. Many advancement staff quietly endure this intolerable behavior, particularly when perpetrated by external stakeholders including donors, board members, or volunteers. Gaps in institutional response and support for affected staff can significantly impact employee retention and performance. Addressing unwanted and unwelcome behaviors requires a multifaceted approach and broad support industry-wide, including training to empower and protect staff members, as well as transparent reporting and remediation processes. We must challenge ourselves to engage in these uncomfortable, high-stakes conversations at every level of our organizations, from team members to administration to boards.

Learning Objective 1: Develop an awareness and understanding of the prevalence of harassment in the field, particularly the challenges and nuances of dealing with problematic behavior from external stakeholders.

Learning Objective 2: Strategize how best to help lead your institution at every level to promote a safe and respectful advancement environment.

Speakers: **Karen Isble**, Vice President for College Advancement, Kalamazoo College; **Michael Andreasen**, Vice Chancellor for Development, University of North Carolina at Chapel Hill; **Jessica Elmore**, Senior Director of Diversity, Equity, Inclusion, and Belonging Training (DEIB), CASE; **Alison Traub**, Executive Director of Development and Alumni Relations, University of Cambridge

**9:30 – 10:00 AM**

**Coffee Break in the Marketplace**

*Location: America's Hall 1*

**10:00 – 11:00 AM**

**Closing Key Session: Chief Experience Officers in Education**

*Location: Grand Ballroom*

Earlier this year, the [Chronicle of Higher Education](#) noted an emerging role on senior leadership teams in education--the Chief Experience Officer--borrowing a model in the corporate world, especially in health care and retail. The role is designed to span the design of the student experience, from point of first recruitment contact through engaged alumni. What implications does such a role have for advancement professionals? What challenges and opportunities does it present? What can we learn from institutions that are early adopters?

Speakers: **Mo Cotton Kelly**, Vice President, Alumni Relations, University of Connecticut Foundation; **Melore Nielsen**, Vice Provost for Student Success, Seattle University; **Todd Sloan**, Vice President for Development, Quinnipiac University; **Lisa Marsh Ryerson**, Provost, Southern New Hampshire University

**11:00 AM**

**Conference Adjourns**

**Thank you for attending!**