Facing new realities: Research insights and leaders’ perspectives

Program agenda and speaker bios

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Dear Colleagues:

Welcome to Facing new realities: Research insights and leaders’ perspectives, a virtual Fellows Symposium sponsored by the TIAA Institute. We are delighted you could join us.

Nearly two years into the pandemic, life on campus (and everywhere else) has changed considerably, creating new financial and operational pressures for colleges and universities of all types. Today’s program is designed to help leaders navigate these challenges and prepare for the uncertainties ahead.

As part of the agenda, we will review new thought leadership that examines the evolving academic workforce, look at steps campus leaders have taken to blunt the pandemic’s impact at their institutions, and explore trends and external forces shaping the future of postsecondary education.

Symposiums like these are central to the TIAA Institute’s mission. We were founded to build and share knowledge on issues vital to the higher education community, and we couldn’t do that without the support of scholars and leaders like you. Thank you for adding your voice to these important discussions!

With best regards,

David P. Richardson  
Head, TIAA Institute
# Higher Education Leadership Fellows Symposium

## Facing new realities: Research insights and leaders’ perspectives

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## Agenda

<table>
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| 12:30 p.m. | Welcome and opening remarks  
*David P. Richardson*, Head, TIAA Institute |
| 12:45 p.m. | The academic workforce: Critical components and considerations for the future  
Institute research addresses multiple facets of the evolving academic workforce, including a [recently released paper](#) written to help higher education leaders rethink policies and practices related to non-tenure track faculty (who now comprise more than 70% of the academic workforce). The paper extends *liberatory design thinking*, an approach to addressing equity challenges and change efforts in complex organizations like colleges and universities. 

The session will also explore key insights from a forthcoming Institute paper, *Enabling Possibility: Reform of Faculty Appointments and Evaluation*.

The author is proposing a path forward where decisions about faculty engagements and performance might be more responsive to multiple forms of scholarship, teaching and service. |

**Moderator:**  
*Craig Parkin*, Senior Managing Director, TIAA

**Speakers:**  
*Adrianna Kezar*, Dean’s Professor of Leadership, Wilbur-Kieffer Professor of Higher Education, University of Southern California  
*KerryAnn O’Meara*, Professor of Higher Education, University of Maryland
Higher education leaders’ views on challenges and opportunities: Insights from ACE Pulse Surveys
The TIAA Institute supported a series of surveys fielded by the American Council on Education (ACE) among member presidents and other senior administrators to deepen understanding of responses to the pandemic, expectations for the future, and issues deemed most pressing. A discussion of key findings will assess how perceptions are aligning with reality across institutional types.

Moderator:
Timothy Rodgers, Managing Director, TIAA

Speakers:
Morgan Taylor, Associate Director, Research, American Council on Education
Hironao Okahana, Assistant Vice President of Research, American Council on Education

Fast forward: Forces defining the future of postsecondary learning
A research initiative by the New England Board of Higher Education (NEBHE) is examining trends and external forces most relevant to the development of tomorrow’s postsecondary learning infrastructure. This session will explore critical issues confronting leaders in creating a vision for the future state.

Moderator:
Lindsay Hartman, Managing Director, TIAA

Speakers:
Michael Thomas, President, New England Board of Higher Education
Donald Sarra, Policy Analyst, New England Board of Higher Education

Discussant:
Jacqueline Moloney, Chancellor, UMass Lowell

Closing remarks
David P. Richardson, Head, TIAA Institute
Herman Berliner
Hofstra University

The Lawrence Herbert Distinguished Professor, Dr. Herman A. Berliner is in his 51st year at Hofstra University. He is a professor of economics who served for 28 years in total as Provost of the University and 12 years as Dean of Hofstra’s Frank G. Zarb School of Business. In recognition of the quality and length of his service, Dr. Berliner has been awarded an honorary Hofstra University Doctor of Humane letters degree and a Hofstra University Presidential Medal.

Dr. Berliner served as Provost and Senior Vice President for Academic Affairs from 1989 until July 2015. He returned to the position in 2019 and served until August 2021. In that role, Dr. Berliner was responsible for all the Colleges, Schools and academic programs of the University (not including the medical school), as well as the Libraries, the National Center for Suburban Studies, the Hofstra Museum, and the Saltzman Community Services Center.

Dr. Berliner has also served in key administrative positions, including interim dean and dean of the Frank G. Zarb School of Business (1980-1982, 1983-1989, and 2015-2018), associate provost and associate dean of faculties (1978-1983), acting dean of the School of Education (1983-1984), associate dean of University Advisement (1975-1976) and assistant provost (1976-1977). Dr. Berliner er was a motivating force in establishing the University’s mandatory Course and Teacher Evaluation Program, the Honors Program, the Peer Teaching Program and the University Tutorial Program. As provost, Dr. Berliner played a vital role in the establishment of the School of Communication, as well as Honors College, the School of Engineering and Applied Science, the School of Health Professions and Human Services and the Hofstra Northwell School of Nursing and Physician Assistant Studies.

Dr. Berliner’s area of specialty as an economist include the economics of higher education. He has served as a reviewer for both Middle States, the American Bar Association, as well as EQUIS/EFMD. He presently serves as a TIAA/CREF Institute Fellow and as a board member of The New 42nd Street. He is a former board member and president of the North Shore School District Board of Education. His most recent publication, part of the TIAA series on Voices of Expertise & Experience, is titled “A pandemic opportunity? Reassessment of institutional patterns and practices”.

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Lindsay Hartman
TIAA

Lindsay Hartman is a Market Leader within the Client Relationships division at TIAA (tiaa.org), a Fortune 100 financial services organization and leading provider of asset management and retirement services for the academic, research, medical and cultural fields.

In this role, she has general management responsibility for running all aspects of the geographic territory encompassing the Boston Metro area and the State of Rhode Island. This includes developing strategic business plans and leading integrated, cross-functional teams to execute successfully in support of client needs and business goals. As Market Leader, Lindsay also fulfills the supervisory function to help ensure the team meets regulatory and compliance requirements for delivering Advice.

Lindsay began her financial services career in 1999 at Fidelity Investments. In 2003 she joined the investment division of Citizens Bank as a financial advisor. She has been at TIAA since 2005. Prior to her current role as Market Leader, Lindsay served as both Director of Wealth Management and Financial Consulting Director within the New England territory.

Lindsay holds a Bachelor of Arts degree in Business Economics from Providence College and completed graduate coursework towards a Masters in Financial Planning at Bentley University as well. She holds FINRA Series 6, 63, 7, 24 and 66 registrations as well as applicable state Life and Health Insurance licenses.
Adrianna Kezar
University of Southern California

Adrianna Kezar is Dean’s Professor of Leadership, Wilbur-Kieffer Professor of Higher Education, at the University of Southern California and Director of the Pullias Center for Higher Education within the Rossier School of Education. Dr. Kezar is a national expert of student success, equity and diversity, the changing faculty, change, governance and leadership in higher education. Kezar is well published with 20 books/monographs, over 100 journal articles, and over a hundred book chapters and reports. Recent books include: The Gig Academy (2019) (Johns Hopkins Press), Administration for social justice and equity (2019) (Routledge), The Faculty for the 21st century: Moving to a mission-oriented and learner-centered faculty model (2016) (Rutgers Press), and How Colleges Change (2018) (2nd ed) (Routledge Press).
Jacqueline Moloney
UMass Lowell

Jacquie Moloney, the chancellor of UMass Lowell, is a national leader in innovation in higher education. Appointed in 2015, she is the first woman to lead the university since its founding in 1894. She manages a near half billion-dollar budget, overseeing the activities of more than 2,000 employees and more than 18,000 students.

As chancellor, Moloney’s leadership in the implementation of the university’s strategic plan has resulted in a remarkable institutional transformation. In less than a decade, UMass Lowell has achieved record gains in student enrollment, academic preparedness, research expenditures, fundraising, diversity and graduation and retention rates.

In her more than 30 years with UMass Lowell, Moloney has served as a professor, researcher, dean and as executive vice chancellor. She was a pioneer in web-based learning and she revolutionized the division of Continuing Education to include award-winning online programs that now serve 25,000-plus students nationwide each year.

A strong proponent of integrating entrepreneurial lessons and opportunities throughout campus life, Moloney created UMass Lowell’s Office of Entrepreneurship and Economic Development and established DifferenceMaker, a national model for entrepreneurial programming that engages thousands of students a year in problem-solving activities and competitions.

Moloney holds a bachelor’s degree in sociology and a doctorate in education, both from UMass Lowell, and a master’s degree in social psychology from Goddard College. Her husband, Edward, is an attorney and they have two daughters and four grandchildren.
Hironao Okahana
American Council on Education

Dr. Hironao Okahana is the assistant vice president for research & insights at the American Council on Education (ACE), where he develops and manages a research agenda to help advance the quality of work produced in ACE’s thought leadership areas: equity-minded leadership, institutional transformation, and student success. Prior to joining ACE, he held progressively increasing responsibilities at the Council of Graduate Schools (CGS) for over eight years, culminating his tour there as the vice president for research & knowledge development. As a researcher, his work focuses on enrollment trends, labor market outcomes, diversity and inclusiveness, and organizational analysis of U.S. postsecondary education, with particular emphasis on master’s and doctoral education.

Dr. Okahana has written a number of technical reports, research briefs, and peer-reviewed articles, as well as given academic conference presentations. As an expert, he has served on several technical review and advisory panels for various studies of graduate education, as well as, has delivered invited talks on the state and implications of U.S. graduate education at national and regional convenings. In addition to his role at ACE, Dr. Okahana is a Higher Education Program Affiliate at the George Mason University and an adjunct assistant professor of education at the William & Mary School of Education. Also, he was a Dean’s Fellow for the Graduate School at the University of Maryland, Baltimore County.

Originally from Tokyo, Japan, Dr. Okahana earned his Ph.D. in education and M.P.P. in Public Policy from the University of California, Los Angeles, and his undergraduate degrees from California State University, Long Beach. He resides in Northern Virginia with his wife, Saleha Bholat, who is Associate Dean of Arts at the Loudoun campus of Northern Virginia Community College, and a kindergardener son.
KerryAnn O'Meara
University of Maryland

KerryAnn O'Meara (she, her, hers) is Professor of Higher Education and a Distinguished Scholar Teacher at the University of Maryland, College Park (UMCP). Her research examines faculty careers and academic rewards systems with a particular focus on equity-minded organizational practices that support full participation. Current NSF-funded projects examine equity in hiring, workload, promotion and tenure policy reform, and equity-minded reform of discretionary spaces in academic affairs. She consults with universities on promotion and tenure policy reform, faculty development programs, and organizational practices that sustain equitable workloads.
Craig Parkin
TIAA

Craig Parkin is Senior Managing Director and Regional Segment Head, for the South Central Region of TIAA’s Client Relationships Business. In this role, Craig’s team is responsible for all aspects of the client relationship, including relationship management, plan administration, individual participant advice, education, and wealth management as well as plan growth, acquisition, and retention. His Region has nearly 250 institutions with client’s retirement assets exceeding $100B for more than 800,000 participants in the higher education, cultural and research fields.

Prior to this role, Craig was the Head of Business Effectiveness for TIAA’s Retail Financial Services business, Chief Administrative Officer for the Retail Products & Services unit, and Head of Relationship Management for the company’s 529 college savings business. Before TIAA, he spent 7 years at Bank of America, where he held a variety of leadership positions.

He is a member of TIAA's Enterprise Leadership Group, has served as co-chair of TIAA’s Charlotte Leadership Council, executive sponsor of the Empowered (African American & Caribbean) Employee/Business Resource Group and received the 2019 Inclusive Leader Award. Craig has also created the Breaking Bread Career Series as well as other mentoring and leadership groups for diverse populations within TIAA.

Craig holds a B.A. in economics from Colgate University, was a Hugh McColl Sr. Fellow at the McColl School of Business at Queens University, where he received his MBA and executive coaching certification and completed the TIAA - UNC Kenan-Flagler School of Business Executive Leadership Program. As a FINRA registered representative, he holds his Series 7 & 24 licenses.

Craig serves on the Board of Advisors of the UNC Charlotte Belk College of Business, served on the board of directors for the Alexander Youth Network, and is a member of Phi Beta Sigma Fraternity Inc.
David P. Richardson

TIAA Institute

David P. Richardson is a TIAA managing director and head of the TIAA Institute, which promotes financial security and organizational effectiveness in the education, nonprofit and public sectors. Through research, convenings and communications, the Institute helps leaders anticipate trends, plan future strategies and maximize opportunities for success.

Before joining the Institute, Richardson was senior economist for public finance at the White House Council of Economic Advisers and held the New York Life Chair in Risk Management and Insurance at Georgia State University. He also served as financial economist in the Office of Tax Policy at the U.S. Treasury and as an assistant professor in the Department of Economics at Davidson College.

Richardson’s primary research focus is household financial security, in particular the intersection of public pensions, retirement benefit plans and the behavioral dimensions of financial decision-making. He has published extensively on these topics and is a frequent speaker at conferences. He also is a well-regarded expert on demographic and macroeconomic trends affecting higher education institutions.

Richardson serves on the Pension Research Council Advisory Board at the Wharton School and the Research Committee of the International Centre for Pension Management. He is a trustee of the Employee Benefit Research Institute and has served as a research associate for the Andrew Young School of Policy Studies at Georgia State University and a research fellow for both the China Center for Insurance and Social Security Research at Peking University and the Center for Risk Management Research. He is a member of the American Economic Association, the American Risk and Insurance Association, the National Tax Association and the National Academy of Social Insurance.
Timothy Rodgers
TIAA

Timothy Rodgers is a Market Leader within the Client Relationships division at TIAA (tiaa.org), a Fortune 100 financial services organization and leading provider of asset management and retirement services for the academic, research, medical and cultural fields.

In this role, Tim has general management responsibility for running all aspects of the geographic territory encompassing Northern Virginia, Washington DC, Maryland, and Delaware. This includes developing strategic business plans and leading integrated, cross-functional teams to execute successfully in support of client needs and business goals. As Market Leader, He also fulfills the supervisory function to help ensure the team meets regulatory and compliance requirements for delivering Advice. Tim serves our clients from the local Baltimore, MD TIAA office.

Tim began his financial services career in 1988 at The Vanguard Group. He then joined the institutional division at Fidelity Investments in 2000. Tim has been at TIAA since 2011.

Tim holds a Bachelor of Science degree in Mass Communications from Norfolk State University. He also holds an MBA from Eastern University. As a FINRA registered representative and principal, he holds Series 6, 63, 26, 7, 24 and 66 registrations. Tim is a 2005 Fellow of The Partnership Diversity Leadership Program, Boston MA.
Donald Sarra
New England Board of Higher Education

Donald Allen Sarra is a Policy & Research Analyst at the New England Board of Higher Education. Specifically, he works directly with the President and CEO to conduct research on the digital future of colleges and universities. Donald also works at Harvard University as the Executive Assistant to the Dean of Students of Harvard College. There, he works directly with students, administrators and senior leaders to design and implement initiatives that would facilitate the transition of students into Harvard and college more generally.

Prior to these roles, Donald worked in multiple tech companies in Boston where he specialized in partnerships with clients and strategic operations. Namely, Donald helped start and grow the Partner Success Operations Team at Mainstay (previously AdmitHub). Through that role, he worked closely with administrators from 100+ colleges and universities across the country to effectively leverage artificial intelligence to help students navigate the college lifecycle.

Donald holds a bachelor’s degree in economics and mathematics from Boston University where he was a presidential scholar and recipient of an undergraduate research grant in his senior year. He also holds a master’s degree in higher education from the Harvard Graduate School of Education where he specialized in student development and belonging.
Morgan Taylor
American Council on Education

Morgan Taylor is an associate director for research at the American Council on Education (ACE). In her role, Morgan manages research projects and analyzes quantitative and qualitative data on issues related to diversity, equity, and inclusion; race and ethnicity in higher education; minority serving institutions; and institutional leadership. She also lends her expertise to matters related to higher education policy and governance.

Morgan holds an MPP from The George Washington University and a BA from Grand Valley State University.
Michael K. Thomas
New England Board of Higher Education

Michael K. Thomas is the President and CEO of the New England Board of Higher Education (NEBHE) in Boston, Massachusetts, an organization providing strategic policy leadership, capacity-building programs, professional development and consulting services to public policy makers and senior leaders of New England’s 250 colleges and universities.

Dr. Thomas directs NEBHE’s policy, research, publishing and programmatic activities, focused on promoting innovative postsecondary and life-long learning practices—and on expanding collaboration among leaders of business, government and higher education.

He has worked in corporate training and human resources and held varied administrative positions in higher education institutions, both public and private. Prior to joining NEBHE, he served as Executive Assistant to the President at Lesley University in Cambridge, Massachusetts.

He holds a bachelor’s degree in philosophy from Brigham Young University and master’s degrees in higher education from Teachers College, Columbia University and Harvard University. He earned a doctorate in education and social policy from Harvard University and an M.B.A. from Boston University.

He has held several university faculty appointments, currently teaching at Harvard University and Northeastern University. Thomas serves in numerous board and advisory roles and is a Certified Director through the National Association of Corporate Directors (NACD), the nation’s largest organization focused on advancing exemplary governance and board leadership for public, private, and nonprofit organizations. He is a trustee of New England College and served as trustee and vice chair of the board of Worcester State University. He also serves on the board of the Foundation for Student Success.
Thought leadership on higher education

Higher education leadership
College and university presidents respond to COVID-19: 2020 Fall term survey
College and university presidents respond to COVID-19: 2021 Spring term survey
College and university presidents respond to COVID-19: 2021 Spring term survey, part II
Presidential perspectives on building next-generation postsecondary digital learning enterprise: Survey report
Fast forward: Forces defining the future of postsecondary learning

Future workforce trends
The new normal: Higher education in a post-COVID-19 world
How might faculty roles & engagements evolve in light of the global pandemic?
Employment volatility in the academic workforce: Implications for faculty financial and retirement plans
How has COVID impacted retirement readiness among healthcare workers?
Faculty retirement and COVID-19 Findings from the 2020 Higher Education Financial Wellness Survey
Retirement readiness among the higher education workforce: Impact of COVID-19
Financial wellness among the higher education workforce: Impact of COVID-19
Can strategic alliances move higher education beyond its “Digital Dunkirk Moment” to build our next-generation learning infrastructure?

Inclusion, diversity & equity
Design for equity in higher education
Social mobility, race and higher education
Financial aid innovations for college affordability and mitigating student debt
Aligning financial sustainability with student access and success: Opportunities for private colleges

Retirement security
Trends in retirement plan contributions and asset allocations by TIAA participants: 2012 to 2018
Financial wellness

Financial well-being and literacy in the midst of a pandemic: The 2021 TIAA Institute-GFLEC Personal Finance Index

2021 P-Fin Index Executive Summary

Employment volatility in the academic workforce: Implications for faculty financial and retirement plans

Financial well-being among Black and Hispanic women

Healthcare costs

The cost of retirement health care: Expectations and concerns of older workers
About the TIAA Institute

For more than 20 years, the TIAA Institute has helped advance the ways individuals and institutions plan for financial security and organizational effectiveness. The Institute conducts in-depth research, provides access to a network of thought leaders, and enables those it serves to anticipate trends, plan future strategies and maximize opportunities for success. To learn more, visit tiaainstitute.org.