Navigating a Challenging Landscape: Endowments and Financial Sustainability in Higher Ed

2022 Institute for Chief Academic Officers with Chief Financial and Chief Enrollment Officers
Presenters

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The Approaching Demographic Cliff

TREND IN US BIRTH RATES
YEARLY, 1980–2020

EconoFacts econofacts.org
Questions?
Critical Questions to Support Cross-Functional Discussions

- When was the last time your Board reviewed its endowment spending policy?
- How is the institution approaching preservation/growth of intergenerational equity given declines in expected investment returns?
- What percentage of annual operations is the endowment projected to fund over the next five years? Has that percentage trended up or down in recent years?
- Does your investment manager understand the enterprise-level issues you are facing and incorporate that into endowment management considerations?