The Council of Independent Colleges

Creating **Tomorrow's Institutions,** Together

2026 Institute for Chief Academic Officers with Chief Advancement, Enrollment, Financial, and Marketing Communication Officers

November 7–10, 2026 ■ Baltimore, Maryland

Balancing Mission and Margin: AI-enabled scenario-planning for strategic sustainability

Presented by

- Zach Kinzler, Head of Academic Sales Strategies, BoodleBox
- Karen An-hwei Lee, Provost, Wheaton College (IL)
- Brad Fuster, Provost and Vice President for Academic and Student Affairs, San Francisco Bay University
- Gregor Thuswaldner, Vice President for Academic Affairs and Dean of the Faculty, La Roche University (PA)

Balancing Mission and Margin: *AI-enabled scenario-planning for strategic sustainability*



CIC CAO Institute in Baltimore
Monday, November 9, 2026 - 90 minutes total

Session Overview

5 minutes

Session Objectives

1. Cultivate Cross-Functional Alignment and Shared Understanding

2. Apply a Practical Framework for Strategic Trade-offs

3. Leverage AI and Scenario Planning to Support Human Judgment

4. Foster Transparent, Evidence-Based Stakeholder Communication



Introduction and Context

- **Who We Are**
- **Our Shared Mission**

  CIC campuses with unique missional emphases

  Different approaches to endowment role, cost flexibility, faculty tenure system, student experience, auxiliary services, etc.

  United by student-centeredness and educational primacy



WHEATON COLLEGE
For Christ & His Kingdom

SAN FRANCISCO BAY UNIVERSITY

LA ROCHE UNIVERSITY

boodlebox

Designing the Sandcastle Bot

CIC CAO Task Force Meeting: January 2026 in Washington, D.C.

- Dr. Brad Fuster proposed a "build-your-own-university" concept
- Dr. Karen Lee suggested using BoodleBox to "vibe code" a bot
- Vice President Titi Ufomata invited Dr. Gregor Thuswaldner into the collaboration

The Collaborative Build Process with Boodle Box

- Zach Kinzler, Head of Human AI Solutions, provided tech support
- Karen created a "sandcastle" metaphor and used ChatGPT Plus for simulation elements
- Brad contributed higher education expertise to "Knowledge Bank"
- Karen, Brad, and Gregor tested and refined the simulation

Sandcastle Bot: AI Financial Simulation Tool

Institutional Understanding

- Building understanding of institutional finances
- Bridging academic and financial decision-making

Strategic Applications

- Cabinet-level strategic discussions
- Peer-to-peer institutional comparisons
- Strategic planning support for Chief Academic Officers
- Exploring budget levers and financial scenarios
- Testing institutional decisions in a risk-free environment

Faculty Development

- Financial literacy education
- Department chair training and planning

Sandcastle Simulation Scorecard

Private, Independent, Tuition-Dependent College Edition

I. Institutional Foundations (Mostly Fixed)

Primary Identity (choose one):

☐ Classical Liberal Arts College
☐ Liberal Arts Plus (pre-professional overlays)
☐ Professionally oriented small university

Institutional Character:

☐ Faith-anchored / mission-explicit
☐ Values-informed
☐ Non-sectarian

Campus Model:

☐ Predominantly residential
☐ Hybrid residential/commuter
☐ Primarily commuter

II. Tuition-Dependent Financial Model

Primary Revenue Source:

☐ Net tuition (dominant)
☐ Net tuition + modest endowment support

Discount Rate Strategy:

☐ High tuition / high discount
☐ Moderate tuition / moderate discount

Endowment Role:

☐ Limited / mostly restricted
☐ Modest but flexible
☐ Strong relative to size

Cost Flexibility:

☐ High fixed costs
☐ Moderately flexible
☐ Highly adjustable

III. Academic & Faculty Architecture

Faculty Labor Model:

☐ Tenure-dominant
☐ Mixed tenure and term
☐ Primarily term-based / contingent

Teaching Load Norms:

☐ Teaching-intensive
☐ Balanced teaching/service
☐ Teaching + scholarship expectations

Curriculum Structure:

☐ Strong core curriculum
☐ Flexible pathways
☐ Interdisciplinary emphasis

Academic Services (Registrar, Advising, IR):

☐ Fully in-house
☐ Hybrid
☐ Selective outsourcing

IV. Student Experience Commitments

Student Life Emphasis:

☐ High-touch, residential experience
☐ Balanced academic/co-curricular
☐ Academics-first, lean co-curricular

Athletics:

☐ Central to enrollment strategy
☐ Important but contained
☐ Minimal emphasis

Student Support Investment:

☐ Basic compliance
☐ Moderate, strategic
☐ High-touch, resource-intensive

V. Enrollment & Reputation Strategy

Primary Enrollment Focus:

☐ Traditional first-year students
☐ Transfer and re-entry students
☐ Adult / graduate programs

Market Signal:

☐ Mission and formation
☐ Outcomes and employability
☐ Distinctive niche identity

VI. Advancement & External Support

Fundraising Model:

☐ Annual fund-dependent
☐ Major gifts focused
☐ Campaign underway

Gift Flexibility:

☐ Mostly restricted
☐ Balanced
☐ Meaningful unrestricted support

External Partnerships:

☐ Limited and selective
☐ Strategic academic partners
☐ Enrollment-driven partnerships

VII. Resilience After the Tides

After stress events, rate each area:

Area	Holding	Strained	Eroding
Mission Coherence	☐	☐	☐
Net Tuition Margin	☐	☐	☐
Faculty Morale	☐	☐	☐

VIII. Reflection

- **Most fragile structural choice:** _____
- **Most mission-faithful choice:** _____
- **One thing I would rebuild differently:** _____

FINAL PROMPT

If the tides intensified next year, what would you protect at all costs—and what might you finally let wash away?

Human Agents: What we bring to the table



Demonstration: Sample Scenarios

10 minutes

Live Demo



Sample Scenarios

The Demographic Cliff. A projected 15% drop in regional high school graduates hits your state. Your VP of Enrollment comes to your office and projects a 10% miss on the incoming class target. You face a stark choice: Do you shrink the college (and execute those painful program cuts immediately to balance the budget), or do you lower your admissions standards and increase your tuition discount rate just to maintain headcount?

The Athletics Trap. Panicked by the demographic data, a vocal faction on your Board of Trustees bypasses the strategic plan. They propose adding five new varsity sports (e.g., lacrosse, e-sports, bowling) to put "heads in beds." They argue it’s a quick, surefire fix for enrollment. As the Chief Academic Officer, how do you respond to the Board regarding the hidden academic and financial costs of this strategy?

How to Find the Bot

5 minutes

Accessing the Sandcastle Boodle Bot

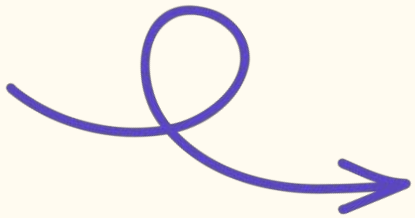
1. Navigate to box.boodle.ai; sign-in or create a free account

   OR

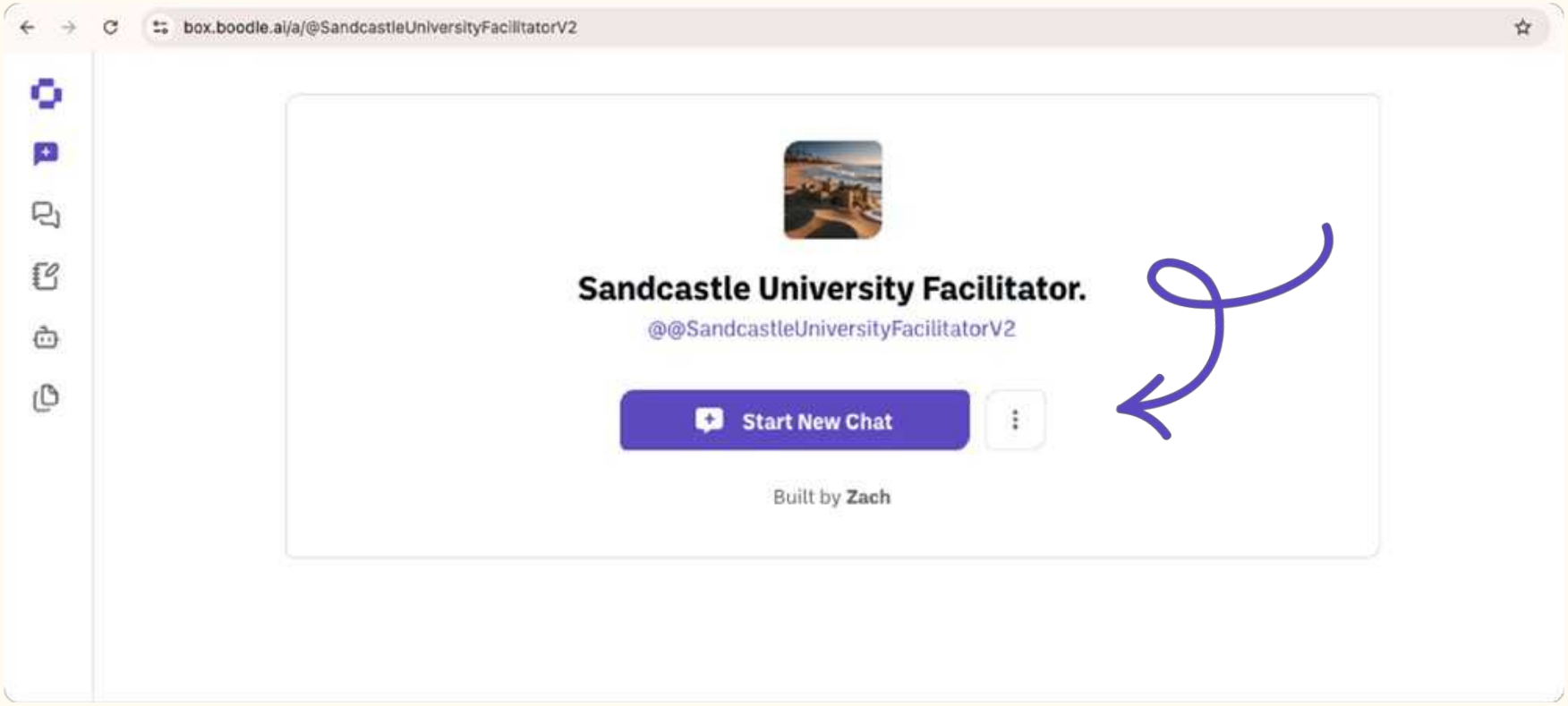
2. Click https://box.boodle.ai/a/@SandcastleUniversityFacilitatorV2

   OR

3. Scan the QR code



Select ‘+ Start New Chat’ to Begin



Guided Prompts

30 minutes

Hands-On Activity: Table Groups

Scan to get your handout:

Your table has been assigned one of three universities:

- Lazy River University — well-resourced, comfortable cushions
- Marchon University — mission-driven, margin-conscious
- Payne University — resilient, under real pressure

What to do:

1. Read your university's profile
2. Enter the Scorecard selections into the Sandcastle Bot
3. Enter the IPEDS data into the bot
4. Run the scenario prompt at the bottom of your profile
5. Be ready to share one insight with the room

Key Takeaways: Group Share Out

30 minutes

Key Takeaways: Table Discussions

What are your key (concrete) takeaways from this simulation?

Appoint a table representative to report out as we "pass the mike."

1. What did your fictitious university reveal about the pressures facing real institutions like yours?
2. Which financial lever had the most impact in the simulation — and why?
3. What conversation would you want to have with your CFO based on what you saw?



High Level Data Summaries

10 minutes

Takeaways from High-Level Data Summaries

- General spread of data from universities
- Other key data points of interest



Sandcastle University Bot Decision Dashboard for CAOs and CEOs

Pie-chart view of dummy bot decisions that keep institutional mission versus decisions favoring financial footing.

Executive KPI	Value	CAO / CEO question
Total bot decisions	120	How many decisions are included?
Keeps institutional mission	64	Are decisions aligned with academic purpose and student impact?
Favors financial footing	56	Are decisions protecting liquidity, margin, and durability?
Mission share	53.3%	What percent of decisions preserve mission?
Financial footing share	46.7%	What percent of decisions favor financial sustainability?
Balanced leadership note	Mission and financial footing are both necessary	Use the pies to see where bot decisions lean.

Decision Orientation	Count
Keeps institutional mission	64
Favors financial footing	56

Decision Lean: Mission vs Financial Footing

Decision Category	Mission	Financial
Scholarship exception	13	5
Program recommendation	13	6
Academic policy	4	3
Student support escalation	5	8
Payment plan	8	9
Course load guidance	7	8
Admissions eligibility	6	8
Retention intervention	8	9

2026 Closure/Consolidation Planning Band

User	Role	Total	Mission		
Ava Patel	Admissions Counselor	10	7		
Marcus Lee	Financial Aid Advisor	9	4		
Nia Brooks	Student Success Coach	12	5		
Omar Rivera	Enrollment Manager	17	14		
Mei Chen	Academic Advisor	15	6	9	40.0%
Jordan Kim	Career Services	12	6	6	50.0%
Priya Shah	Dean	14	7	7	50.0%
Lena Torres	Retention Specialist	7	5	2	71.4%
Sam Okafor	Program Chair	12	3	9	25.0%
Iris Nguyen	Bot Admin	12	7	5	58.3%

Mission-Keeping Decisions by Category

Financial-Footing Decisions by Category


Thank You for
Attending and Participating

Thank you for attending this session!