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

Thank you to our sponsor



Workshop for Experienced CAO's

Saturday
November 7, 2026



Lauren Bowen, Provost, Juniata College
Celia Cook-Huffman, Provst, Allegheny College

Agenda

8:00–8:10 a.m.	**Welcome**
8:10– 8:45 a.m.	**Introductions - Sharing Your "why"**
	"It does not matter how long you are spending on the earth, how much money you have gathered or how much attention you have received. It is the amount of positive vibration you have radiated in life that matters." – Amit Ray
8:45 - 9:45 a.m.	**Managing Down, Across, and Up: Working Across Multiple and Complex Systems**
9:45 - 10:00	**Break**
10:00 - 10:45	**The Landscape of Contemporary Higher Education - Tabletop Conversations**
10:45 - 11:30.	**Organizational Culture and Leadership: Lessons from the Field**
11:30 a.m.–12:30 p.m.	**Lunch**
12:30 - 1:30	**Vision, Program Portfolios, and Strategy: Managing Change**
1:30– 1:45 p.m.	**Break**
1:45-2:45 p.m.	**Leading in the Academy**
2:45 – 3:00 p.m.	**What Next? Identifying Action Items for You and Your Institution**
3:00 p.m.	**Adjournment**

Welcome!

“It does not matter how long you are spending on the earth, how much money you have gathered or how much attention you have received. It is the amount of positive vibration you have radiated in life that matters.” – Amit Ray

Managing
Up, Down and Sideways

"People who are truly strong lift others up. People who are truly powerful bring others together." – Michelle Obama

Managing UP

Key Questions:

- How do you manage the conflicting goals and values that exist between the CAO, the President, the Board and the faculty?
- How do you identify areas of shared understanding and goals?
- What is your president's leadership style?
- What are useful strategies you take when you need to pause your decision in the face of pushback?
- How do you repair relationships when trust or mutual understanding has been challenged?
- Do you have Cabinet allies when you face challenges?

Managing your Leadership Team

Key Questions:

- How would you describe the dynamics of the leadership team?
- What cultural norms shape their interactions?
- What conflicting goals exist among and between the members of the team?
- What is the overall level of trust in the team?
- How would you identify areas of shared understanding and goals?
- How do you coach individual members vs the team?
- How do you build trust?

The Landscape Of Higher Education

Tabletop Conversations



1. Enrollment Management
2. Reporting Requirements
3. Generative and Agentic AI
4. Future of Tenure
5. Budget Challenges
6. Managing Change

What is the nature of the challenge on your campus?

What key constituencies are involved/impacted?

Does process exist for moving through the challenge or do you need to shape and define process?

What have you learned?

Organizational Culture and Leadership

Lesson From the Field

Panelists

- Leanne Neilson, Cal Lutheran University
- Pete Holbrook, Tiffin University
- Debbie Johnson-Ross, Wartburg College
- Jeff Frick, Washington and Jefferson College

Questions

1. How have the current higher education headwinds (political, economic, demographic, etc.) shifted your work priorities or perhaps made something you were already doing more urgent? (8-10 minutes)

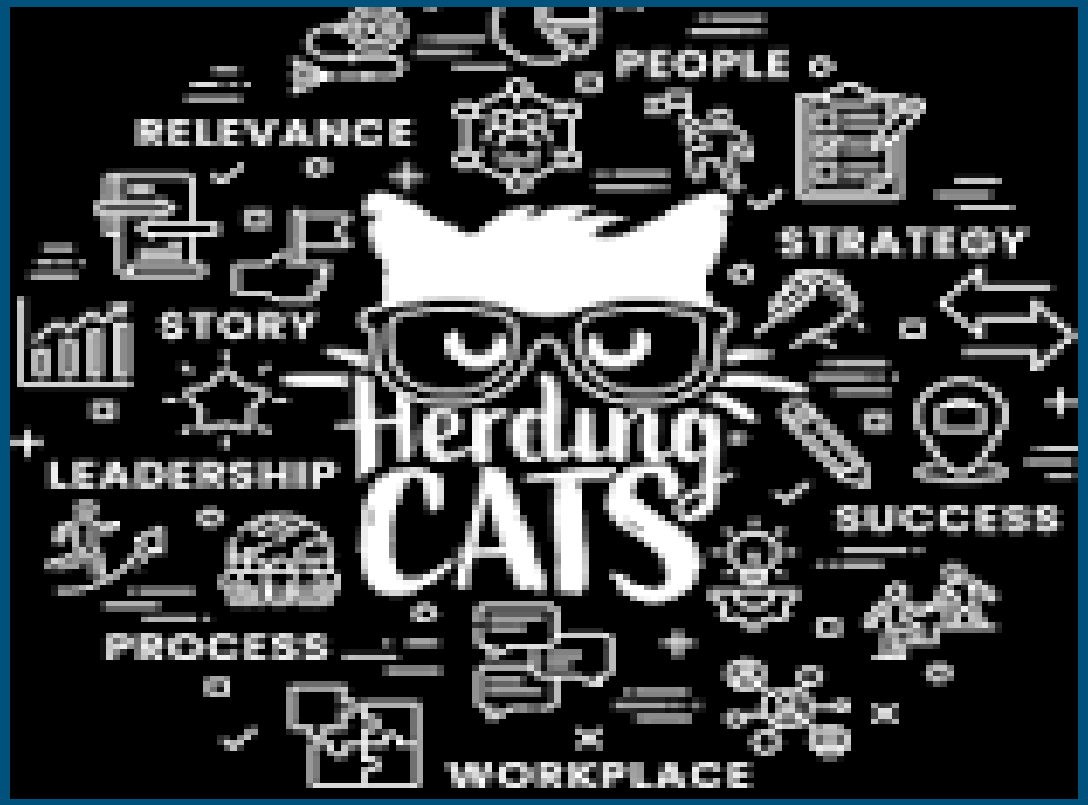
1. One strategy campuses are utilizing to deal with the challenges facing the sector is to develop more, and different types of partnerships. Partnerships can range from “light integration” (dual enrollment or articulation agreements) to full mergers. What partnerships has your institution considered/developed and why? What has worked and what unanticipated challenges have you had to deal with?

1. In light of our conversation earlier this morning about managing up, down, and across, offer a particularly salient experience of managing up (to your president), across (to your senior colleagues), and down (to your faculty and/or direct reports). Lessons learned? Advice for the group? (8-10 minutes)

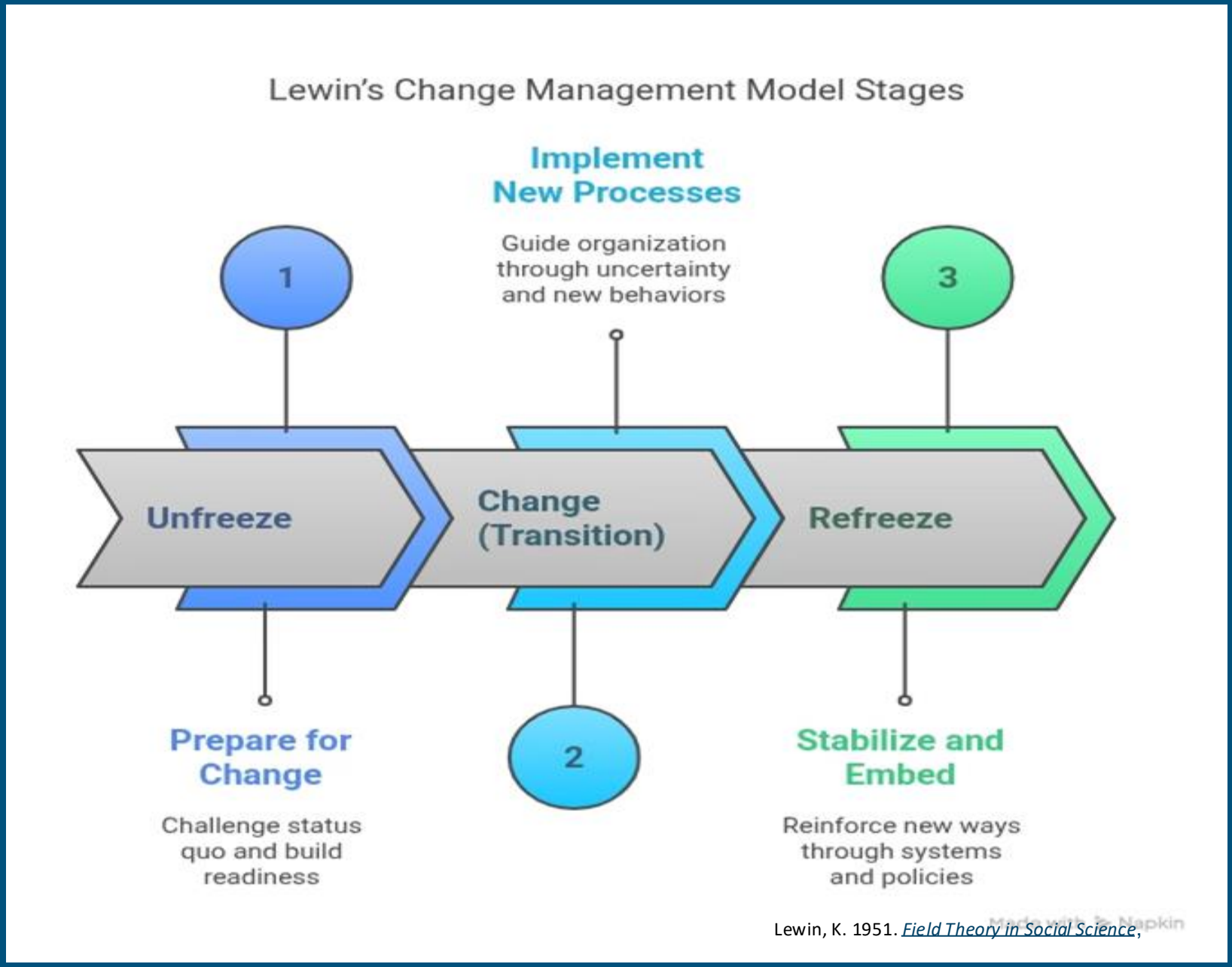
1. How is your campus grappling with generative AI? How would you describe the opportunity and the challenges? How are they different for faculty vs. staff? (8-10 minutes)

1. Each of you have navigated and negotiated transitions into new roles and out of previous roles. All of us have had periods of enormous satisfaction and periods of stress and fatigue in our jobs as CAOs. What is your advice for the group on how to discern when/if it’s time to make a move and when it makes sense to weather the stress? (5-7 minutes)

1. What in your work inspires hope and optimism? And how do you practice self-care? (5-7 minutes)



Managing Change



Lewin, K. 1951. *Field Theory in Social Science*,

“Unfreezing”
Connecting the “Why” and the “How”

Drivers

- Budget
- Accreditation
- Market Data
- Enrollment Trends
- Labor Demand Regionally/Nationally
- Faculty Turnover

Process

- Program Prioritization
- “Start, Stop, Grow”
- Sustainable Programs
- Annual Health Checks
- Connection to Program Reviews/Assessment
- Internal Data/External Data Management Team

Academic Program Alignment: A Case Study in Change Management

This isn't new - ongoing alignment to meet changing demand, overall enrollment decline, and budget pressures.

Program alignment serves as a check-in point to see how prior investments and opportunities are performing and what new opportunities there are to align finite resources to market demand.



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Goals of Academic Program Alignment

The goal of this work is to more purposefully align our academic program portfolio with our current and future context so that we anticipate student interests and regional/national workforce needs.

We need to realign resources to invest in growth areas and disinvest in others; adaptation and adjustment will occur in every academic department.

Anticipated Levers:

Number and Size of POEs (majors)
Class Size/Caps
Faculty Staffing – Full and Part-time

Building the Change

01

groups

Stakeholders

02

account_tree

Decision Process

03

schedule

Timeline

04

analytics

Data Needs

05

shield

Identify Barriers

06

trending_up

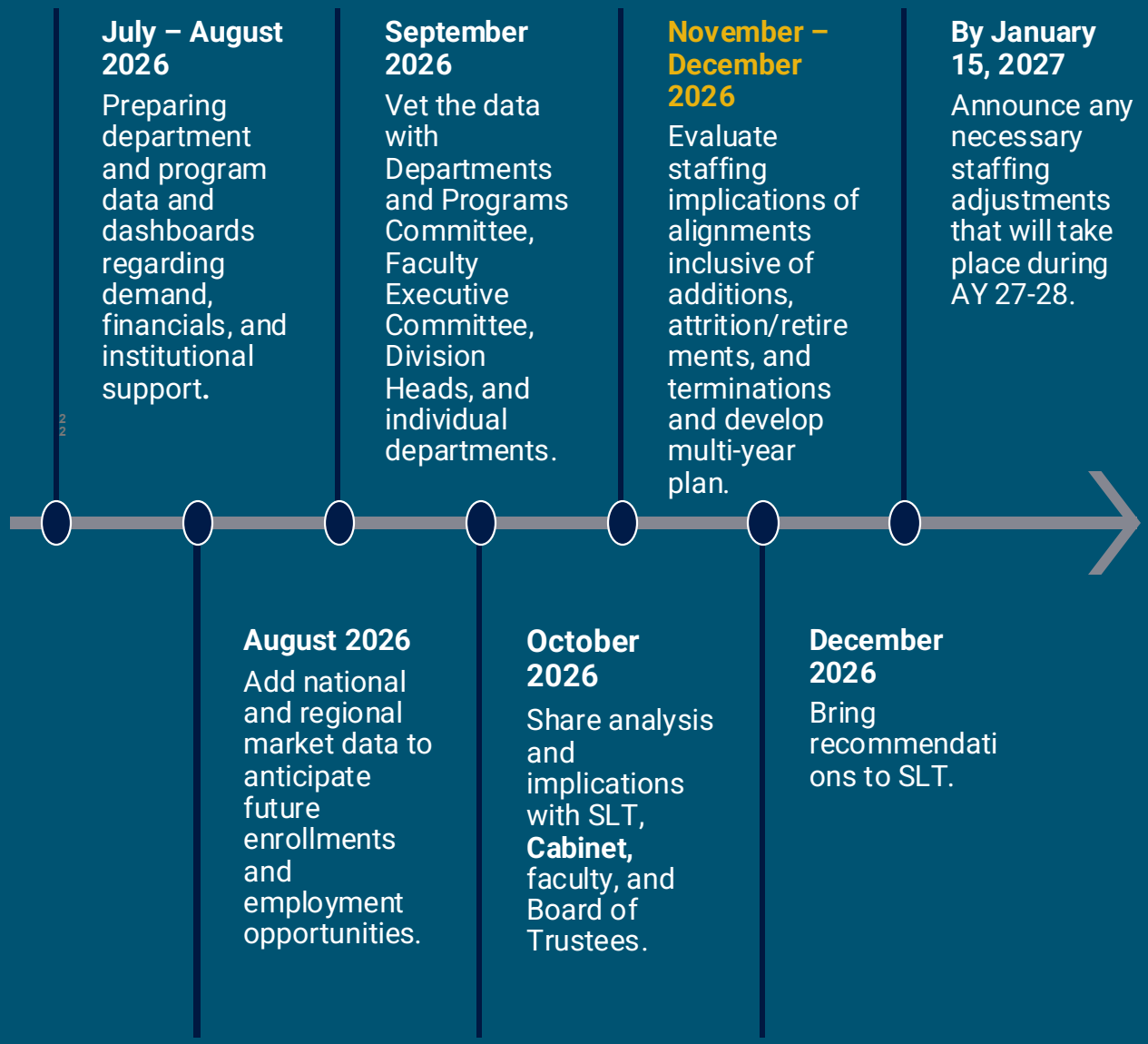
Build Momentum

Stakeholders and Decision Making

Senior Leadership Team	• affirm timetable and plan in August, routine updates and input
President's Cabinet	• present timetable and plan in September • vet analysis and implications in October
Department and Programs Committee	• affirm charge and scope in September, discuss progress weekly, develop recommendations in committee
Faculty Executive Committee	• affirm plan in September, provide weekly updates
Division Heads	• vet dashboard in September, preview findings and recommendations
Academic Departments	• visit to affirm data in September, meet as necessary to share recommendations/decisions in December and January
Education Committee of BOT	• affirm plan in October
Full BOT	• present findings and recommendations in December
President/Provost	• make and communicate final decisions by January 15, 2027

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Timetable



Data - both preparation and new processes

Data Choices

- Internal or External Analysis
- Market Data Sources
- Dashboards or Confidential
- Transparency and Trust
- How much Data
- Level of ability to manipulate the data
- Quantitative and Qualitative

Metrics

- Majors
- Minors
- General Education Contributions
- Program FTE
- Major FTE
- Faculty Student Ratio
- Retention
- Yield
- DFW
- Transfer in/out
- Contribution Margin
- Course Fill Rates

Key Department and Program (POE) Variables

Demand

- Total Enrollment
- Deposits
- Student Credit Hours
- Degree Conferrals

*5-yr average and trend for each

Financial (Operating Expense)

- Contribution Margin in $
- Contribution Margin %
- Costs per full-time equivalent student (operating budgets only)

Market

- % Yield: 5-year average and trend
- Market Share Strength
- Market Share Opportunity
- U.S. Bureau of Labor Statistics Outlook

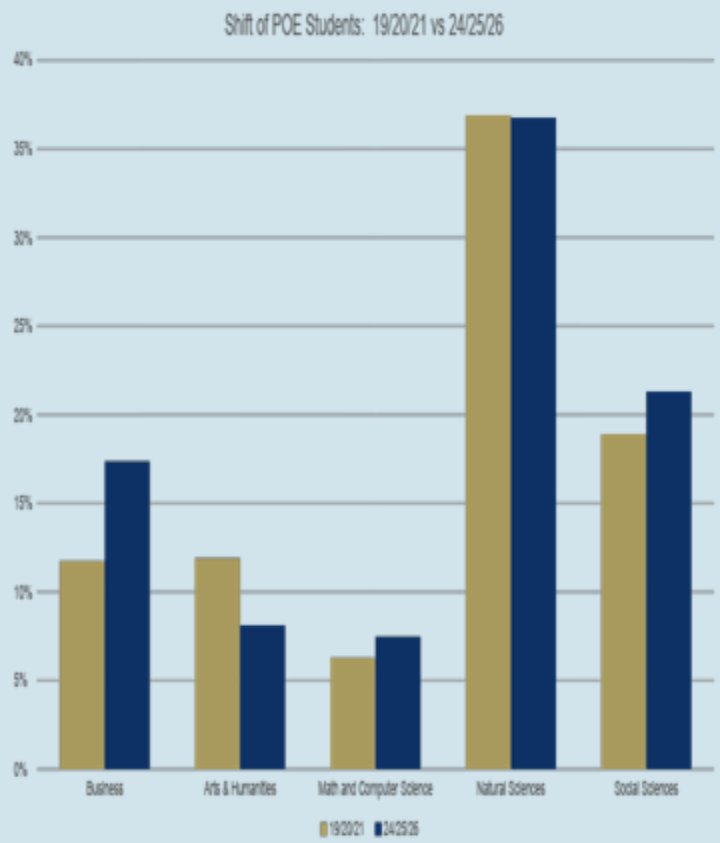
Support

- # POEs per full-time faculty: 5-year avg.
- Student Credit Hours per full-time faculty: 5-year avg. and trend
- Course Section Size: 5-year avg. and trend
- Degree of Program Course Overlap

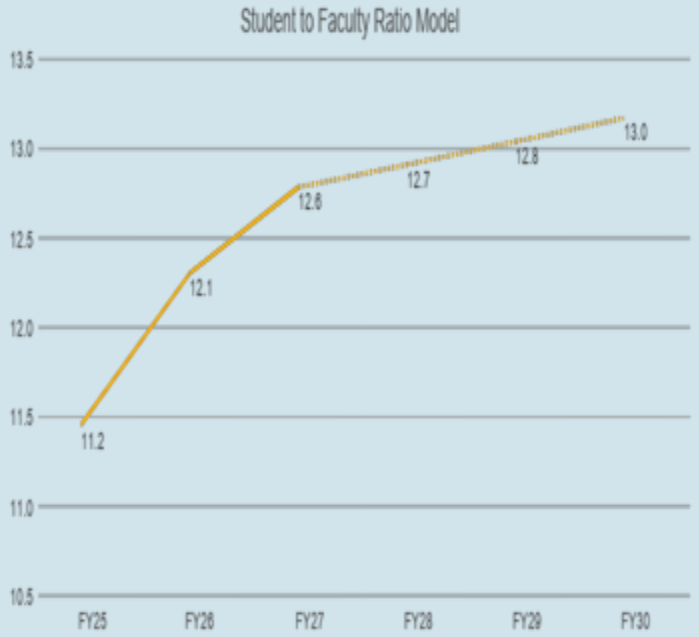
Potential Barriers
Institutional

Mission Drift
Liberal Arts Focus
Carnegie Classification
Arts & Sciences vs Professional
Rankings
Student to Faculty Ratio
Alumni Impact
Appetite for News Attention
Anticipating Retirements

Institutional Context



In FY26, 19% of first year students enrolled in new programs. In FY27, it was 28%



Student Interest & Job Outlook: External Context

Per College Board and Pennsylvania SAT Data, the following areas of intended study are most popular among high school students:

- Business Management & Marketing – trending up
- Health Professions & Clinical Sciences – trending up
- Engineering – trending up
- Biological & Biomedical Sciences – trending up
- Psychology – stable

CollegeBoard

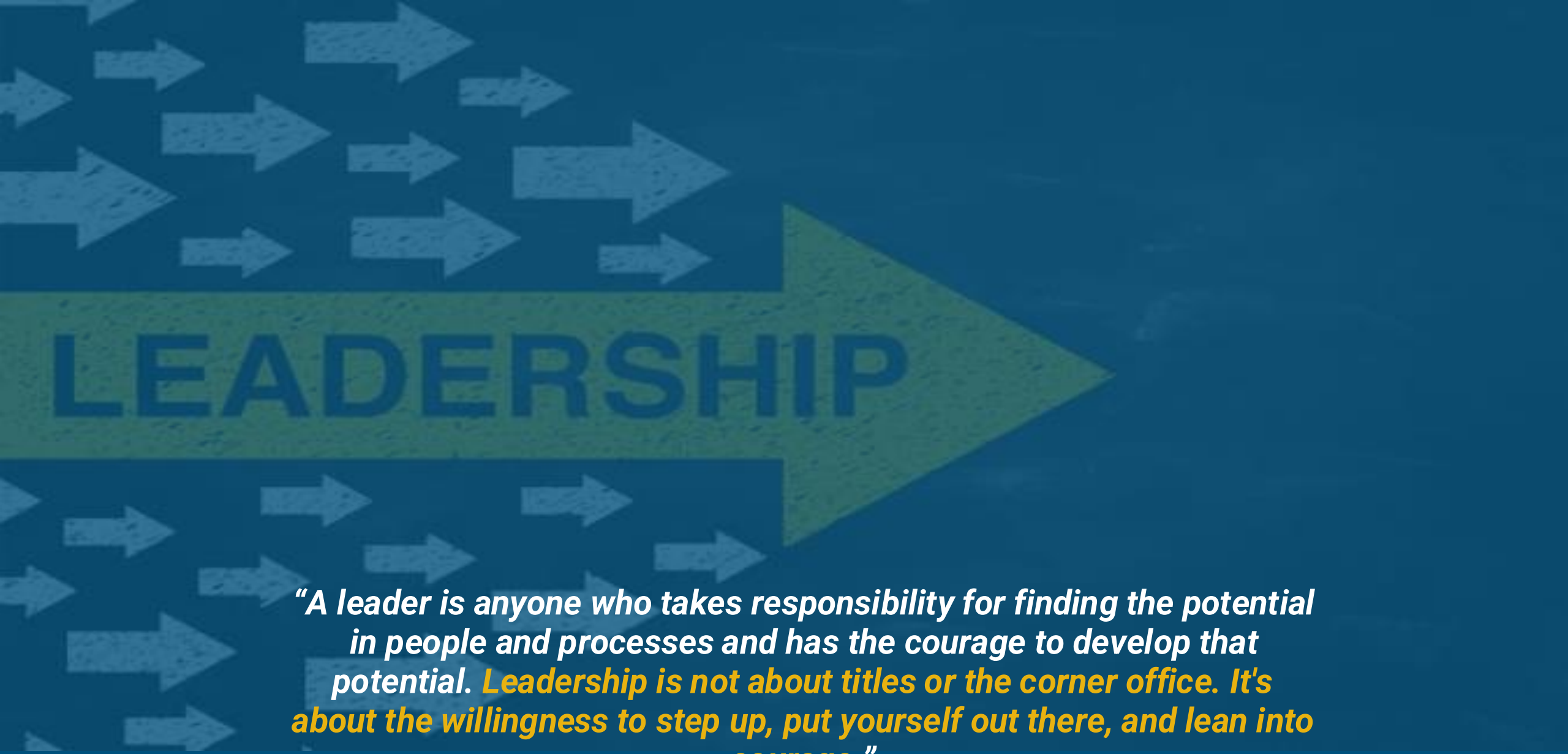
Per the U.S. Bureau of Labor Statistics, the following areas are projected to have the most new jobs between 2025 and 2035:

- Business Management & Marketing
- Computer and Information Sciences
- Health Professions & Clinical Sciences
- Biological & Biomedical Sciences
- Psychology
- Social Work

U.S. BUREAU OF LABOR STATISTICS

“Refreezing”
Institutionalizing the Process

Annual Health Checks
Data Dashboards
Assessment and Planning Connections
Faculty Staffing Analysis
Course Rotations, Caps and Staffing
Start, Stop, Grow
Budgeting and Planning



“A leader is anyone who takes responsibility for finding the potential in people and processes and has the courage to develop that potential. Leadership is not about titles or the corner office. It's about the willingness to step up, put yourself out there, and lean into courage.”

Brene Brown

Paradoxes of Leadership

- The Paradox of **Role Expectations**:
  - Meeting role expectations requires you to create your own.
- The Paradox of **Problem Perception**:
  - Problems are unavoidable; avoid problems.
- The Paradox of **Control**:
  - The leader is in control; the leader does not control.
- The Paradox of **Concern**
  - The leader is tender and cares for individuals; the leader is tough and cares about the organization.

… and more

- The Paradox of **Planning**:
  Plans must always be revised; Plan carefully.

- The Paradox of **Rewards**:
  People don't work for rewards; reward people.

- The Paradox of **Accomplishment**:
  Delegate to others; do it all yourself.

- The Paradox of **Decision**:
  Do not make decisions until you have it all figured out; act before you are sure.

The Leadership Paradox: Balancing Logic and Artistry in Schools
Terrence Deal and Kent Peterson

Dimensions of CAO Leadership

Strategic	• Planning, Diversifying Revenue, Attending to Academic Program Mix, Voice on Senior Team, Goal Setting
Managerial	• Faculty and Staff Development, Evaluation and Accountability,
Pastoral	• Conflict Resolution, Acknowledging career rhythms, Attention to students and families
Curricular	• Developing new academic programs, outcomes assessment, oversight of general education
Financial	• Establishing and Managing budgets, Securing new resources (grants, philanthropy)
Ceremonial/Public	• Campus Visibility, Attendance at key events, Public remarks at ceremonies and events, Commencement

Building on Your Own Resources

- ✓ Institutional knowledge – if you have it, use it; if you don't, find it.
- ✓ Relationships – cultivate them, preserve them.
- ✓ Navigating conflict *can* be easier if you know the players.
- ✓ Being *relatively* unencumbered by role-related stereotypes can create room to be creative
- ✓ Clear is Kind

Self Care

What is one intentional change will you make to increase your effectiveness as a leader?

Leadership can be lonely. Who on your campus would be your best conversation partner about leadership issues?

Who have you met at this conference who could be a good conversation partner about leadership issues? *Make an explicit plan to contact them.*

Thank you for attending this session!

