



**LILLY FAMILY**  
SCHOOL OF PHILANTHROPY

A WORKSHOP ON HIGHER EDUCATION AND PHILANTHROPY

# Philanthropy's Role in the Future of Higher Education

**DECEMBER 1–2, 2022**  
Indianapolis

# WELCOME

**On behalf of our organizing group, I am pleased to welcome you to Indianapolis and our Higher Education and Philanthropy Workshop.**

One of the positive possibilities of philanthropy is to create the space to imagine and implement our public lives in different ways, in better ways. Sometimes poised outside the kind of democratic legitimacy we typically seek for public action, philanthropy's value lies in generating useful alternatives -- supplementing, complementing, and challenging the status quo.



The history of philanthropy is in part the legacy of generosity upon which so much possibility has been built. It is also the history of actions undertaken in the name of generosity that have undermined the possibilities of human flourishing.

It is in this context that we convene. It is a context in which both philanthropic practices and higher education are ever more contested, while so much is expected of them. Whatever your perspective, it seems hard to maintain that the status quo in philanthropy and higher education is sustainable. The time is right to consider alternatives, and, for our workshop, to ask how philanthropy can and should play a role in the future of higher education.

The community of discovery we are forming for two days of focused deliberation brings together voices that diverge on what the key issues are and how best to approach them. And yet we gather in the belief that there is value in engaging each other's perspectives. We do so to see if some form of this temporary community might be usefully continued and extended to inform and advance the public good. Can we identify a program of discovery and research, perhaps in tandem with a series of ongoing convenings, that could advance the public good by better connecting philanthropy and higher education? This may involve creating better bridges among different kinds of scholarly and practitioner communities that do not regularly engage each other. It may also involve ideas that will become apparent only as we talk with each other.

I want to thank all our participants whose bios you will find in this program. Your presence and engagement are generous offers of good will and ready fellowship. Thank you for joining this exploratory endeavor to advance the public good through curiosity and discovery.

Best wishes,

A handwritten signature in black ink, appearing to read 'Amir Pasic', written in a cursive style.

Amir Pasic

*Eugene R. Tempel Dean*

Indiana University Lilly Family School of Philanthropy

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# SPONSORS

The Lilly Family School of Philanthropy and the Workshop Organizing Committee are grateful to the sponsors of this convening. Their generous support has made it possible for us to bring together top leaders, scholars, and practitioners from across the landscape of higher education and philanthropy.



# LOGISTICS

## **Registration**

Workshop check-in will take place on December 1 beginning at 11:30AM at the Lumina Convening Center.

## **Wi-Fi**

**Network:** Guest@luminafoundation.org

**Password:** Goal2025!

## **Luggage Storage**

Storage space for luggage will be available at the Lumina Convening Center.

## **Reimbursements**

The Lilly Family School of Philanthropy will provide reimbursements for all travel related expenses. Please save copies of your receipts that include the last four digits of your credit card number. We will provide a submission form for reimbursements following the workshop.

## **Accessibility Information**

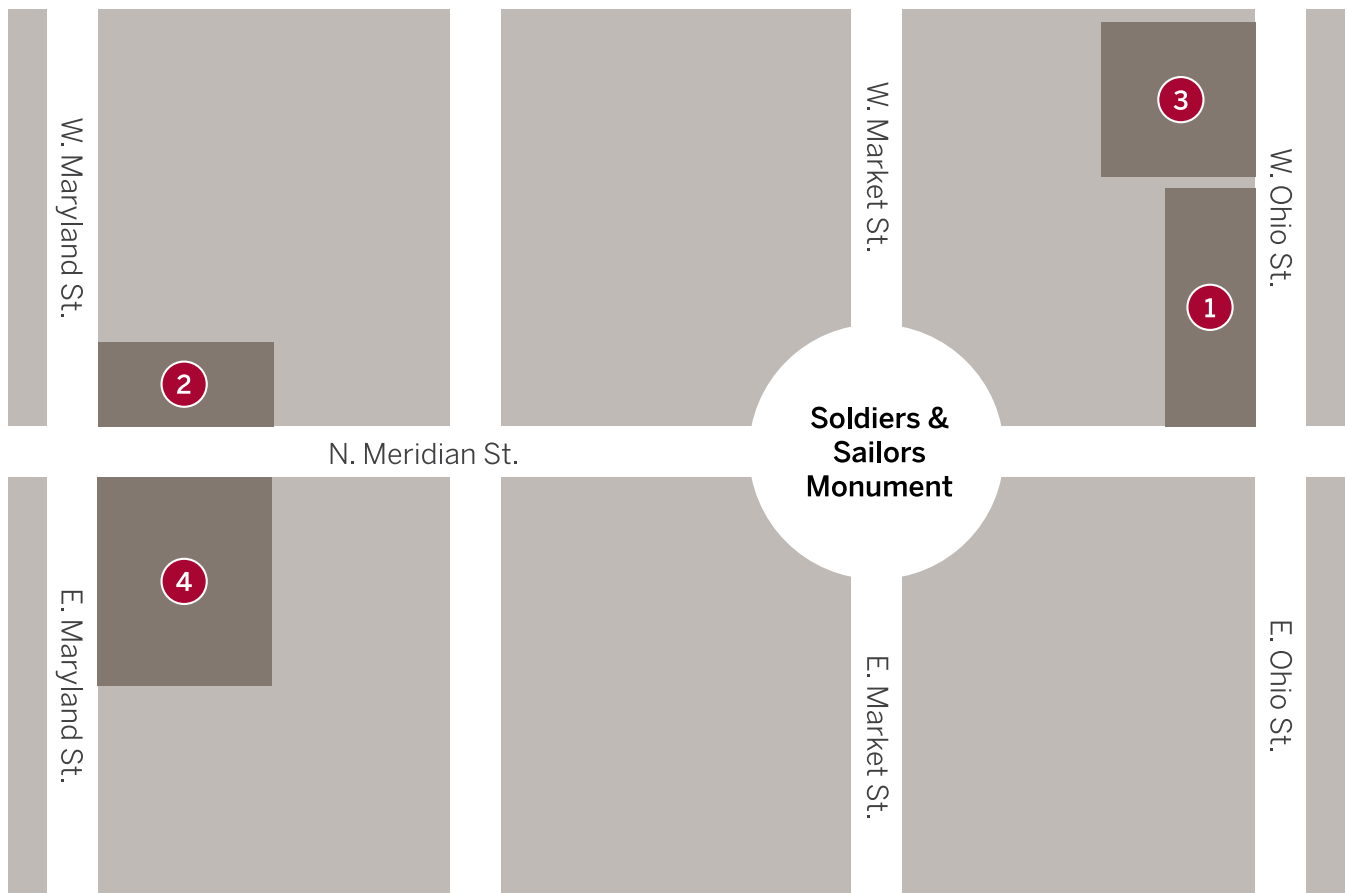
The Lilly Family School of Philanthropy is committed to providing the best possible experience for all participants. If you have accessibility needs or require accommodations throughout the conference, please ask any of the Lilly Family School staff and they will make every effort to ensure your needs are met.

## **Health & Safety**

This event complies with current local and state COVID-19 health and safety requirements. The Lumina Convening Center requires that all participants be fully vaccinated against COVID-19 and that they not attend the workshop if they have reason to believe they have contracted COVID-19 or if they are displaying related symptoms.

# LOGISTICS *(Continued)*

## Locations



## Hotel and Dinner Location

- 1 The Sheraton Indianapolis City Centre Hotel**  
31 West Ohio Street,  
Indianapolis, IN 46204

## Workshop Location

- 2 Lumina Convening Center**  
30 S. Meridian St., Suite 700  
Indianapolis, IN 46204

## Parking

- 3 Sheraton Hotel Garage**  
55 West Ohio Street,  
Indianapolis, IN 46204
- 4 Merchants Garage**  
(across from Lumina Convening Center)  
31 S. Meridian Street, Indianapolis, IN 46204  
*Please see a member of the Lilly Family School Staff for a parking validation ticket.*

# WORKSHOP SCHEDULE

## Thursday, December 1

11:30AM

### **Registration Opens**

Lumina Convening Center

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12:00PM

### **Opening Luncheon and Dialogue**

Lumina Convening Center

**Speakers:** Amir Pasic and Jamie Merisotis

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1:00PM

### **Session 1: Philanthropy's Contributions to Higher Education**

Lumina Convening Center

**Facilitator:** Richard Ekman

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2:00PM

### **Break**

Lumina Convening Center

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2:15PM

### **Session 2: The Major Factors Impacting Higher Education and Philanthropy**

Lumina Convening Center

**Facilitator:** Genevieve Shaker

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3:15PM

### **Break**

Lumina Convening Center

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3:30PM

### **Session 3: The Societal Role of Philanthropy in Higher Education**

Lumina Convening Center

**Facilitator:** Erin Hoffmann Harding

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4:30PM

### **Adjourn and Hotel Check-In**

Sheraton Indianapolis City Centre Hotel

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5:30PM

### **Reception**

Sheraton Panorama Ballroom (21<sup>st</sup> Floor)

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6:15PM

### **The Future of Higher Education and Philanthropy Dinner and Discussion**

Sheraton Panorama Ballroom (21<sup>st</sup> Floor)

**Welcome Remarks:** Andy Klein, IUPUI Interim Chancellor

**Keynote Panel Speakers:** Arthur Levine, Ruth Watkins, Meredith Woo

# WORKSHOP SCHEDULE *(Continued)*

## Friday, December 2

8:00AM

**Breakfast**

Lumina Convening Center

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8:30AM

**Synthesis of Day 1 and Framing for Concurrent Sessions**

Lumina Convening Center

**Facilitators:** Noah Drezner, Terry Flannery, and Bill Moses

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9:30AM

**Concurrent Sessions: Examining the Future of Higher Education and Philanthropy**

Lumina Convening Center

**Facilitators:** Courtney Brown, Phil Harper, Patricia Snell Herzog, David King, Donna Nicol, and Carol Schuler

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10:30AM

**Break**

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10:45AM

**Plenary Session: Report Out and Next Steps**

Lumina Convening Center

**Facilitator:** Amir Pasic

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12:00PM

**Adjourn. Boxed Lunches Available.**

Lumina Convening Center



# THANK YOU

**The Indiana University Lilly Family School of Philanthropy would like to thank all participants of this inaugural Workshop on Higher Education and Philanthropy. We appreciate your contributions to this convening and your leadership in the field.**

The Lilly Family School is also grateful to the organizing committee that has guided the development of this workshop since its inception. Thank you for your invaluable input and expertise which has made this convening possible.

## Workshop Organizing Committee



**Richard Ekman, PhD**  
*President Emeritus  
Council of Independent Colleges*



**William Plater, PhD**  
*Executive Vice Chancellor and Dean of Faculties Emeritus  
Chancellor's Professor Emeritus of Public Affairs, Philanthropy, and English  
Indiana University-Purdue University Indianapolis*



**Genevieve Shaker, PhD**  
*Associate Professor of Philanthropic Studies  
Indiana University Lilly Family School of Philanthropy*



# FULL AGENDA

**Thursday, December 1**

11:30AM

**Registration and Lunch**

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12:00PM

**Opening Dialogue**

In conversation with Jamie Merisotis, facilitated by Amir Pasic, workshop participants will help set the stage for the convening by engaging Lumina Foundation's focus on access and equity in higher education through its highly focused strategy. We will also seek Jamie's thoughts as we begin to consider the issues and trends that are in play as philanthropy and higher education seek to advance the public good.

**Opening Dialogue:** Amir Pasic and Jamie Merisotis

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1:00PM

**Session 1: Philanthropy's Contributions to Higher Education**

Many approaches have been tried by philanthropists—individuals as well as foundations and corporations—to improve higher education, some more successful than others. Which of these approaches have succeeded and why? Which have not proven effective and why? Have some problems in higher education been definitively “solved” through philanthropic activity? Have the needs of higher education changed so much that the lessons learned from earlier decades about what works are no longer likely to be effective as ways to address the current challenges? This session will discuss several past examples of success and failure when philanthropy has focused on higher education and highlight the forms and techniques of philanthropic activity that show greatest promise for amelioration of some of the current and emerging issues in higher education.

**Guiding Questions:**

In what unique ways does current philanthropy, on balance, positively or adversely affect higher education's duty to advance the common good? What is the proper relation between philanthropy and higher education?

**Facilitator:** Richard Ekman

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2:00PM

**Break**

# FULL AGENDA *(Continued)*

2:15PM

## **Session 2: The Major Factors Impacting Higher Education and Philanthropy**

Americans donate more to higher education than to any purpose besides religion. Philanthropic dollars are unevenly distributed across institutions and purposes. It is thus difficult to describe and document philanthropy's overall contribution to the common good through higher education. Session participants will briefly review what we know about giving trends and influences and explore what information is needed for higher education philanthropy to best serve society's needs.

### **Guiding Questions:**

What are the major "factors" (principles, ideals, ideologies, economic/market forces, laws, regulations, existential changes, et cetera) that have had the greatest impact on shaping philanthropy to and by higher education in the past twenty years? What changes in the most impactful factors should be made for the future for what purpose(s)? Which current institutional forms should philanthropy support?

**Facilitator:** Genevieve Shaker

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3:15PM

## **Break**

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3:30PM

## **The Societal Role of Philanthropy in Higher Education: Can Philanthropy Respond?**

A variety of societal trends are changing and challenging who attends higher education, how it is delivered, its outcomes, and the institutions providing post-secondary education. Which trends are most urgent to address? What role should philanthropy play in responding? Are there challenges in higher education where philanthropy should avoid playing a role? Session participants will briefly review what we know about demographic and industry trends and discuss the areas where engagement between higher education and philanthropy may be most impactful.

### **Guiding Questions:**

What does society (in its private and public, individual and collective, forms) need to know about the role of philanthropy in higher education as it evolves in the future to enable individual institutions to achieve their respective missions, to enable governments to regulate philanthropy to and by higher education, and to enable donors to achieve their respective intents?

**Facilitator:** Erin Hoffmann Harding

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4:30PM

## **Adjourn and Hotel Check-In**

# FULL AGENDA *(Continued)*

**Thursday, December 1**

**The Future of Higher Education and Philanthropy Dinner**

The Sheraton City Centre Panorama Ballroom (21<sup>st</sup> Floor)

5:30PM	<b>Reception</b>
6:15PM	<b>Welcome Remarks</b>
7:00PM	<b>Panel Discussion</b>

At dinner workshop participants will be joined by local leaders and community members. The evening will open with welcome remarks from IUPUI Interim Chancellor Andy Klein and will feature a panel discussion with Arthur Levine, *Distinguished Scholar of Higher Education, New York University Steinhardt Institute for Higher Education Policy*, Ruth Watkins, *President of Strada Impact*, and Meredith Woo, *President of Sweet Briar College*.

## KEYNOTE PANEL DISCUSSION ON THE FUTURE OF HIGHER EDUCATION AND PHILANTHROPY

Higher education and philanthropy share a common root in their service to the common good. Never an end in itself, money has been the leverage philanthropy could use to effect change. There are now more actors seeking to influence the purposes and outcomes of higher education than any time in the history of higher education. This is a time when the public purpose of higher education, in particular, may be at risk or at least subject to redirection as the predominant economic model for American higher education appears to be failing. The keynote panel discussion with Levine, Watkins, and Woo, moderated by Eugene R. Tempel Dean Amir Pasic, examines the current landscape of higher education and philanthropy, and how the two historical allies should prepare to serve a shared vision of the common good in the future.



Arthur Levine



Ruth Watkins



Meredith Woo



# FULL AGENDA *(Continued)*

## Friday, December 2

8:00AM

### **Breakfast**

Please enjoy a social breakfast with colleagues.

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8:30AM

### **Synthesis of Day 1 and Framing for Concurrent Sessions**

This session led by the co-facilitators will share reflections on the key themes and questions raised from the first day's plenary sessions. These learnings and the ensuing discussion will set the stage for the concurrent breakout sessions.

**Facilitators:** Noah Drezner, Terry Flannery, and Bill Moses

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9:30AM

### **Concurrent Sessions: Examining the Future of Higher Education and Philanthropy**

Participants will break out into table groups to consider three main questions that emerge from the first day's discussion.

**Facilitators:** Courtney Brown, Phillip Harper, Patricia Snell Herzog, David King, Donna Nicol, and Carol Schuler

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10:30AM

### **Break**

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10:45AM

### **Plenary Session: Report Out and Next Steps**

Each facilitator will share their group's findings which will identify next steps and follow-up activities. The discussion of the group reports will inform the content and timing of prospective future convenings.

**Facilitator:** Amir Pasic

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12:00PM

### **Adjourn. Boxed Lunches Available.**

# PARTICIPANT BIOS



## **Courtney Brown**

*Vice President of Impact and Planning, Lumina Foundation*

Courtney Brown, Ph.D, is vice president of impact and planning for Lumina Foundation, an independent, private foundation in Indianapolis that is committed to making opportunities for learning beyond high school available to all. As the chief data and research officer, Brown oversees the foundation's efforts in the areas of strategic planning, learning, impact, and effectiveness. She also leads Lumina's international engagement. Prior to joining Lumina, Brown was a senior research associate at the Center for Evaluation and Education Policy at Indiana University. There, she led studies and evaluations focused on education and post-high school programs within the United States and across Europe. Brown is a frequent speaker and panelist in the United States and other countries regarding postsecondary strategy, student success, data-driven decision making, and evidence-based practices. Brown serves on the University of Virginia's School of Education and Human Development Board of Directors, on the advisory board for the Center for First-Generation Student Success, and the advisory board for WGU Indiana. She holds a bachelor's degree from James Madison University and earned her master's and doctoral degrees from the University of Virginia.



## **Noah Drezner**

*Professor and Special Advisor to the Provost, Teachers College, Columbia University*

Noah D. Drezner (he/him) is a Professor of Higher Education, Director of the Higher and Postsecondary Education Program, Special Advisor to the Provost for Doctoral Education, Chair of the Faculty Executive Committee (senate), and Principle Investigator of The Tzedakah Lab at Teachers College, Columbia University. Additionally, he is founding editor of *Philanthropy & Education* (Indiana University Press) and formerly a Visiting Professor of Education and Philanthropic Studies at Beijing Normal University. Drezner is internationally known as a leading researcher on educational philanthropy. His research interests include philanthropy and fundraising as they pertain to colleges and universities, including higher education's role in the cultivation of prosocial behaviors. Drezner is an active alumni leader at the University of Rochester. He serves as president of the Hillel at the University of Rochester Board and co-chair of the University's Diversity Advisory Council. Outside of the University, Noah serves on the Justice Policy Institute Board and is the former treasurer of the Organization for Refuge, Asylum & Migration (ORAM), a nonprofit dedicated to bringing LGBTQI refugees to safety. Drezner holds his Bachelor of Science from the University of

Rochester, a graduate certificate in non-profit leadership from Roberts Wesleyan College, and his Master of Science in Education and Doctor of Philosophy degrees from the University of Pennsylvania.



**Richard Ekman**

*President Emeritus, Council of Independent Colleges*

Richard Ekman, PhD is President Emeritus of the Council of Independent Colleges. He is currently a Fellow of the TIAA Institute and Lecturer in the University of Pennsylvania's Executive Doctorate in Higher Education program. Previously he served as Vice President for Programs of Atlantic Philanthropies, as Secretary of the Foundation and Senior Program Officer of the Andrew W. Mellon Foundation, and as Director of the Divisions of Research Programs and Education Programs at the National Endowment for the Humanities. He is currently the Chair of the Board of Directors of the Higher Education Research and Development Institute, Of Counsel to Academic Search, Special Advisor to the Registry for College and University Presidents, a Trustee of Emeriti Retirement Health Solutions, Member and Past Chair of the Board of Directors of Project Pericles, Member of the Board of Directors of SAGE Scholars, and Member of the President's Council of the Gilder Lehrman Institute of American History. He also serves as a Member and Past Council Chair of Harvard University's Graduate School Alumni Association and as Past Chair of the American Academic Leadership Institute. Ekman earned his AB in history and PhD in history of American civilization from Harvard University.



**Terry Flannery**

*Executive Vice President and Chief Operating Officer, Council of Advancement and Support of Education*

Teresa (Terry) Flannery is Executive Vice President and Chief Operating Officer for the Council of Advancement and Support of Education (CASE). In this role, she directs the divisions of Education; Membership, Marketing and Communications; Data, Research and Technology; and Strategic Partnerships. One of the leading university marketing professionals in the world and recognized in 2018 as "International Brand Master," Flannery has led some of the most successful brand campaigns in all of higher education. She is also a consultant, speaker, and author of *How to Market A University: Building Value in a Competitive Environment*, a new book published by the Johns Hopkins University Press in their series for higher education. Before coming to CASE, Flannery held the chief marketing officer role at three institutions, as Interim Vice President for Marketing and Communication at Stony Brook University, as Vice President of Communication at American University, and as Assistant Vice



President at the University of Maryland. Flannery maintains an appointment as a Policy Fellow at American University's Center for University Excellence. She has been a fellow in the Academy for Innovative Higher Education Leadership and served for a decade on the CASE Board of Trustees, including as Chair. Flannery holds a BA in English (American Literature) and a Master's and Ph.D. in Education (College Student Personnel), all from the University of Maryland.



### **Paul Glastris**

*Editor in Chief, Washington Monthly*

Paul Glastris is editor in chief of the Washington Monthly and of the magazine's annual College Guide and Rankings, which won a 2013 Education Writers Association award for data journalism. A former senior speechwriter for President Bill Clinton, he is co-author and editor of two books, *The Other College Guide: A Road Map to the Right School for You* and *Elephant in the Room: Washington in the Bush Years*. He spent a decade as a correspondent in the Midwest and Europe for US News & World Report, where he covered the war in Bosnia and reported from Russia, Greece, Germany, Turkey, and India. He has also written for The New York Times, the Washington Post, The New Republic, and other publications and has been a guest commentator on CNN, MSNBC, NPR, and the BBC. Born in St. Louis, he earned bachelor and masters degrees from Northwestern University. With his late wife, journalist Kukula Kapoor Glastris, he has two children, Hope and Adam.



### **John Glier**

*Chief Executive Officer, Grenzebach Glier and Associates*

John Glier is the Chief Executive Officer of GG+A, a global consulting firm in philanthropic management headquartered in Chicago and London. Mr. Glier joined GG+A in 1981, and has served as its Chief Executive for more than 30 years. Mr. Glier is recognized internationally for providing strategic direction and philanthropic counsel to many leading universities, academic healthcare institutions, cultural and human service organizations, and as an advisor to some of the largest fundraising campaigns in higher education. He has worked with the staff of well over 200 nonprofits and with a wide range of voluntary leaders, noted philanthropists, and Board leaders of distinguished institutions in North America, Europe, Asia, and Australia. He has spoken on many different topics over the years, including campaign planning and strategy in cultural, medical, human services, and educational institutions; building philanthropic board structures; the critical roles presidents and deans play in higher education fundraising; building largescale compelling propositions, the key stages of the successful major gift process; and

talent management and high performance across the nonprofit sector. Mr. Glier is an emeritus member of the Providence College Board of Trustees, served on the Board of Directors of the Family Institute of Northwestern University, and serves as a Life Member of the Division of Humanities Council of the University of Chicago. He has served on the Board of Directors of the New Trier Township High School Educational Foundation and was a founding director of the Winnetka Public Schools Foundation. He has also served as the Director and Chair of the Giving Institute (formerly AAFRC), as a member of EUConsult and the CASE Industry Advisory Council, and more recently as a member of the AMAtlas Advisory Committee to CASE, and a member of the executive committee of the Generosity Commission. Mr. Glier attended Providence College (Rhode Island), the Université de Fribourg (Switzerland), and the University of Chicago, and was awarded a Fulbright Fellowship. He holds degrees in English and Comparative Literature.



**Nabih Haddad**

*Visiting Fellow, Harvard University*

Nabih Haddad is a visiting fellow at Harvard University. His research interests include higher education philanthropy, social change strategies, fundraising, financial feasibility, and student success for underserved and underrepresented communities. In his work, he has explored the role of foundations in nonprofit advocacy and the impact of funders on social change with a social justice-informed approach. His dissertation modeled the social change strategies of major foundations in the college completion agenda, drawing on descriptive and inferential statistics, social network analysis, and semi-structured interviews to examine foundation-led strategies. While at Michigan State University, he contributed to an Andrew Mellon Foundation-funded evaluation study regarding the impact of postdoctoral appointments on career outcomes, providing policy and program recommendations. At the University of Michigan-Ann Arbor, as a postdoctoral research fellow, he worked on The Michigan Doctoral Experience Study (MDES), an ongoing study of the Ph.D. student experiences at the University of Michigan-Ann Arbor. MDES is one of the few quantitative studies capturing socialization processes. Now, in his role at Harvard, he is extending his prior work into applied and theoretical research, namely planning and conducting fundraising feasibility analysis, managing processes and guidelines for working with fundraising and academic partners, and diversifying prospect pipelines. Moreover, he is currently working with The W.K. Kellogg Foundation (WKKF), exploring the mechanisms needed to elevate the needs and concerns of HBCUs and TCUs to the attention of philanthropic agencies, which can offer support by informing policies and practices for future funding strategies. He earned his BA in Political Science from Wayne State University, a Master of International Affairs from Penn State University, and a PhD in Higher, Adult, and Lifelong Education from Michigan State University.





### **Phillip Harper**

*Program Director for Higher Learning, Mellon Foundation*

Phil Harper is program director for Higher Learning at Mellon, having joined the Foundation after serving as Dean of the Graduate School of Arts and Science at New York University. He graduated from the University of Michigan and went on to earn an MFA in creative writing and an MA and PhD in English at Cornell. A literary scholar and cultural critic, Mr. Harper has written extensively on twentieth- and twenty-first-century American and African American fiction, and on aspects of lived experience in the contemporary United States, including the negotiation of racial, gender, and sexual identities, and various modes of mass-cultural production, circulation, and consumption. In addition to publishing numerous articles and co-editing *Queer Transexions of Race, Nation, and Gender* (a special 1997 double issue of the journal *Social Text*), Mr. Harper has authored four books: *Framing the Margins: The Social Logic of Postmodern Culture* (1994); *Are We Not Men? Masculine Anxiety and the Problem of African-American Identity* (1996); *Private Affairs: Critical Ventures in the Culture of Social Relations* (1999); and *Abstractionist Aesthetics: Artistic Form and Social Critique in African American Culture* (2015). Mr. Harper has furthered the work of the Modern Language Association as a member of the advisory boards for the journals *PMLA* and *Profession*, and as member and chair of the James Russell Lowell Book Prize Committee. He has served on the editorial boards of *American Literature*, *Camera Obscura*, *GLQ*, *Postmodern Culture*, and *Social Text*.



### **Patricia Snell Herzog**

*Melvin Simon Chair and Associate Professor of Philanthropic Studies, Indiana University Lilly Family School of Philanthropy*

Patricia Snell Herzog is the Melvin Simon Chair and Associate Professor of Philanthropic Studies in the Indiana University Lilly Family School of Philanthropy and Affiliate Faculty in the Human-Computer Interaction Department of the School of Informatics & Computing. Herzog was previously Associate Professor of Sociology and Co-Director of the Center for Social Research at the University of Arkansas 2013-2018, Visiting Assistant Professor of Sociology at Georgetown University 2017, Postdoctoral Fellow in the Kinder Institute for Urban Research at Rice University 2011-2013, and Assistant Director for the Center for the Study of Religion & Society at the University of Notre Dame 2006-2011. She graduated with her PhD in sociology from the University of Notre Dame in 2011, MA in sociology in 2009, MSW in community practice in 2006, and BA in sociology and psychology in 2000. Her research interests include charitable giving, youth and emerging adults, and religiosity, and she has authored and co-authored numerous articles and books, including, *The Science of College: Navigating the First Year and Beyond* (OUP 2020), *The Science of Generosity: Manifestations, Causes, and Consequences* (Palgrave 2019); *American Generosity: Who Gives and Why* (OUP 2016), and *Souls in Transition: The Religious Lives of Emerging Adults in America* (OUP 2009).



### **Erin Hoffmann Harding**

*Expert Associate Partner, Higher Education, McKinsey & Company*

Erin Hoffman Harding is an Expert Associate Partner in the higher education practice of McKinsey & Company. In this role, Hoffmann Harding, a proven higher education leader, delivers strategic insights and advises a wide portfolio of higher education clients on a vast array of complex problems such as improving student outcomes, increasing access and affordability, and enabling new academic research across the entire education ecosystem. Hoffmann Harding had previously held roles as an engagement manager and business analyst at McKinsey in its Chicago and Cleveland offices during the early stages of her career. Prior to returning to McKinsey in 2021, Hoffmann Harding served in senior leadership positions at the University of Notre Dame. As vice president for student affairs since August 2012, Hoffmann Harding oversaw five areas composed of multiple departments related to residential life, student development, career and professional development, health and wellbeing, and campus ministry. Before her appointment in student affairs, Hoffmann Harding established and served as the first leader of Notre Dame's Office of Strategic Planning and Institutional Research. Hoffman Harding earned her bachelor's degree summa cum laude from Notre Dame's Mendoza College of Business and law degree magna cum laude from Harvard Law School.



### **Peter Hoskow**

*Principal and Managing Director, CCS Fundraising*

Peter Hoskow has devoted his entire career to understanding nonprofits from every angle, partnering with them to develop sustainable solutions to solve complex funding needs. The privilege to work side-by-side with institutional leaders, committed philanthropists, and dedicated experts drives Peter's passion for CCS Fundraising's impactful work. Peter grounds his fundraising strategy with a prepared, personalized approach. His partnerships have deepened and sustained the impact of critical missions: Feeding the hungry, enhancing education, increasing access to life-saving healthcare, and broadening access to the arts. As Principal and Managing Director, Peter oversees CCS's Central United States operations. He serves as the core leader of a passionate, dedicated team of fundraising experts, guiding solutions-oriented partnerships across the region. As part of his dedication the philanthropic sector, Peter serves on the Indiana University Lilly Family School of Philanthropy's Board of Visitors. He is also a member of the Leadership Council of Loyola University's Baumhart Center for Social Enterprise and Responsibility. Peter resides in Chicago's Roscoe Village neighborhood and holds a strong commitment to enhancing responsible social innovation in his home city.



### **Danette Gerald Howard**

*Executive in Residence, University of Southern California Race and Equity Center*

Danette Gerald Howard is the inaugural Executive in Residence at the University of Southern California's Race and Equity Center where she works with corporate and non-profit leaders to embed a commitment to racial equity within their strategies and operations. She also serves as co-chair of the Center's Commission on Historically Black Colleges and Universities and Racial Equity. Prior to her current appointment, Dr. Howard spent eight years at Lumina Foundation where she served as chief strategy and policy officer and senior vice president. In this capacity, Dr. Howard led several key strategies to increase Americans' attainment of high-quality postsecondary degrees and credentials, including work in both state and federal policy, as well as efforts to mobilize and engage employers, metropolitan areas, and higher education institutions. Before joining Lumina, Dr. Howard served as Secretary of Higher Education in Maryland, leading the state's postsecondary education coordinating agency, the Maryland Higher Education Commission, and she held previous posts at the Education Trust, the National Association of System Heads, and the University of Maryland, Baltimore County. A nationally regarded analyst, speaker and thought leader, Dr. Howard serves on numerous boards and commissions including the Association of Governing Board's Council for Student Success, Excelencia in Education's Seal of Excelencia Advisory Council, the 7Mindsets Advisory Board, and the Howard University Board of Trustees where she is chairperson of the Academic Excellence Committee. Dr. Howard earned her bachelor's degree, *summa cum laude*, from Howard University, her master's degree from the Harvard University Graduate School of Education, and her Ph.D. in higher education policy from the University of Maryland. In 2015, she was honored for her outstanding success and national distinction in the fields of education and policy with Howard University's *Distinguished Alumni Achievement Award*.



### **David King**

*Karen Lake Buttrey Director of the Lake Institute on Faith and Giving*

*Associate Professor of Philanthropic Studies, Indiana University Lilly Family School of Philanthropy*

David P. King is the Karen Lake Buttrey Director of the Lake Institute on Faith and Giving as well as Associate Professor of Philanthropic Studies within the Indiana University Lilly Family School of Philanthropy. In 2022, he was affiliated with the University of Edinburgh as the Fulbright Scotland Distinguished Scholar for 2022. Trained as an American religious historian, his research interests broadly include exploring the practices of twentieth and twenty-first

century American and global faith communities as well as more specifically investigating how the religious identity of faith-based nonprofits shapes their motivations, rhetoric, and practice. His first book, *God's Internationalists: World Vision and the Age of Evangelical Humanitarianism* (University of Pennsylvania Press, 2019) won the Peter Dobkin Hall Prize for the best book in the history of philanthropy. With Philip Goff, he is editing the forthcoming volume *Religion and Philanthropy in the United States* from Indiana University Press. As the Co-PI of the National Study of Congregations' Economic Practices, (NSCEP), the largest nationally representative study of congregations' finances, he is helping to build a new field of research on how religious and nonprofit organizations receive, manage, and spend resources. His current work focuses on helping to expand the critical study of philanthropy across multiple scholarly and practitioner oriented communities in order to develop shared conversations across cultures and countries on the role philanthropy plays in shaping the public good.



**Leslie Lenkowsky**

*Professor Emeritus, Paul H. O'Neill School of Public and Environmental Affairs, Indiana University Bloomington*

Dr. Leslie Lenkowsky is Professor Emeritus in the O'Neill School of Public and Environmental Affairs at Indiana University and Senior Counsellor to the Dean at the Lilly Family School of Philanthropy. From 2001 to 2003, Dr. Lenkowsky served as chief executive officer of the Corporation for National and Community Service, a position to which he was appointed by President George W. Bush. Previously, he had served as a director of the Corporation. Before joining the Bush Administration, Dr. Lenkowsky was professor of philanthropic studies and public policy at Indiana University. He has also served as president of the Hudson Institute, an internationally renowned public policy research institute, president of the Institute for Educational Affairs, deputy director of the United States Information Agency, research fellow at the American Enterprise Institute, and research director at the Smith Richardson Foundation. A graduate of Franklin and Marshall College, Dr. Lenkowsky received his doctorate from Harvard University. He is a regular contributor to *The Chronicle of Philanthropy* and has spoken frequently to educational and philanthropic groups throughout the United States and internationally on philanthropy, social entrepreneurship, communications, and other topics.



### **Arthur Levine**

*Distinguished Scholar of Higher Education, New York University*

Dr. Arthur Levine is a distinguished scholar of higher education at New York University's Steinhardt Institute for Higher Education Policy, a senior fellow and president emeritus of the Woodrow Wilson National Fellowship Foundation. Under his leadership, the Woodrow Wilson Foundation transformed into a national leader in educator preparation and school improvement. Staying true to the Foundation's mission of identifying and developing leaders and institutions to meet the nation's critical challenges, Levine created a portfolio of new and innovative programs designed to improve educational opportunities, particularly for high-need communities. Prior to joining the Woodrow Wilson Foundation, Levine was President and Professor of Education at Teachers College, Columbia University. He also previously served as Chair of the Higher Education Program and Chair of the Institute for Educational Management, and Senior Lecturer at the Harvard Graduate School of Education. Dr. Levine received his Ph.D. from the State University of New York at Buffalo and his B.A. from Brandeis University. Dr. Levine has authored 12 books and dozens of articles and reviews on education, including a series of reports for the Education Schools Project on the preparation of school leaders, teachers and education researchers. He has received numerous honors, including Carnegie, Guggenheim, and Rockefeller Fellowships as well as the American Council on Education's Book of the Year Award. He holds 25 honorary degrees and is a member of the American Academy of Arts and Sciences.



### **Jamie Merisotis**

*President and CEO, Lumina Foundation*

Jamie Merisotis, is the president and CEO of Lumina Foundation. Before joining Lumina, he was an advisor and consultant in southern Africa, Europe, the former Soviet Union, and other areas of the world. Merisotis is a Council on Foreign Relations member. An innovator committed to increasing educational attainment in the United States, he focuses on realizing racial justice and equity through Lumina's efforts to recast higher learning for today's students. These adults increasingly are Black and brown, from low-income families, or the first in their families to go to college. Previously, Merisotis was president of the nonpartisan, D.C.-based Institute for Higher Education Policy, which he co-founded. He also was executive director of a bipartisan national commission the president and congressional leaders appointed to study college affordability. Merisotis is the author of *America Needs Talent*, named a Booklist Top 10 Business book of 2016, and *Human Work in the Age of Smart Machines*, an Amazon category bestseller released in 2020. Merisotis is on the governing board of The Ditchley Foundation



in the United Kingdom. He is past chairman and trustee emeritus of the Council on Foundations and he leads a task force for the organization highlighting philanthropy's ethical responsibility to the greater good. He also is past chairman of The Children's Museum of Indianapolis. Merisotis is on the Central Indiana Corporate Partnership board. He advises companies that rely on artificial intelligence and machine learning to address complex challenges related to work and learning. A distinguished graduate of Bates College, he has been awarded honorary degrees from colleges and universities worldwide.



**Jacqueline Pfeffer Merrill**

*Director, Campus Free Expression Project, Bipartisan Policy Center*

Jacqueline Pfeffer Merrill is the director of BPC's Campus Free Expression Project. She works with senior college leaders to provide consultative assistance and expertise in approaches that will support a campus culture that is diverse, inclusive, and open to robust intellectual exchange. Earlier in her career, Merrill served on the faculties of St. John's College, Annapolis, known for its Great Books curriculum, and the College of William & Mary. She has also taught at Duke University, the University of Calgary, Humboldt Universität zu Berlin, and in the college program at Maryland's only prison for women. Her articles and essays have appeared in venues including Chronicle of Higher Education, Inside Higher Ed, and Perspectives on Political Science. Dr. Merrill earned her B.A. (First Class Honours) from the University of Calgary and her M.A. and Ph.D. from Duke University.



**William F. L. Moses**

*Managing Director, Education, Kresge Foundation*

William (Bill) F. L. Moses serves as managing director for The Kresge Foundation's Education Program, which supports postsecondary access and success for low-income, first-generation and underrepresented students. The key architect of Kresge's education programming, Bill leads the team's continuum of domestic and international grant activities from developing program strategy, reviewing preliminary ideas, and helping grantees develop proposals or initiatives, to awarding funding and monitoring existing grants. Since his arrival at Kresge, Bill has served as a program officer and senior program officer, was instrumental in developing Kresge's Green Building Initiative and has spearheaded the foundation's grantmaking in South Africa. Before joining Kresge, Bill served as executive director of The Thomas J. Watson Foundation in Rhode Island and as a senior analyst at the Investor Responsibility Research Center in Washington, D.C. He also worked as a research officer

at TechnoServe and held various administrative positions in Alaska's state legislature and the federal government, including the U.S. Embassy in Cape Town, South Africa. A graduate of Claremont McKenna College, Bill holds a master's degree in international relations from Yale University. He is the author of "A Guide to American State and Local Laws on South Africa" and co-author of "Corporate Responsibility in a Changing South Africa." He was the co-chair of the seven-foundation Partnership for Higher Education in Africa and serves on the steering committee of the Africa Grantmakers' Affinity Group, an organization he co-founded. He also is a member of the National Advisory Board of The College Promise Campaign and a Board Member of APIA Scholars. In 2022, Bill was appointed to serve on President Joe Biden's Board of Advisors on Historically Black Colleges and Universities (HBCUs) with the aim to increase the capacity of HBCUs to provide the highest-quality education to its students and continue serving as engines of opportunity.



**Donna Nicol**

*Professor and Department Chair, Africana Studies, California State University Dominguez Hills*

Dr. Donna J. Nicol is a professor and chair of the Africana Studies Department at California State University Dominguez Hills. She joined the faculty at Dominguez Hills in 2017. Previously, Dr. Nicol taught in the Women and Gender Studies Department at CSU Fullerton where she earned tenure in 2014. Prior to joining the faculty, Dr. Nicol spent seven years in university administration in academic advising administration, multicultural affairs, and federal grant management. Dr. Nicol's research and teaching focuses on three broad areas (1) conservative philanthropy and the politics of curriculum in U.S. higher education, (2) the history of African American women's educational activism and (3) the cultural-identity taxation of women of color faculty. She has publications in *The Feminist Teacher*; *History of Philanthropy*; and *Race, Ethnicity, and Education*, among others. Dr. Nicol was featured in the 2021 Al Jazeera Documentary, *The Big Picture: A Race for America* which examined the role of philanthropy in shaping race relations, education, and health outcomes for African Americans. She also writes opinion columns on race, history, and philanthropy. Dr. Nicol's book project, *Black Woman on Board: Claudia Hampton, the California State University, and the Fight to Save Affirmative Action, 1974-1994* examines race and gender in the exercise of university trustee power and is under advanced contract with the University of Rochester Press.





### **Amir Pasic**

*Eugene R. Tempel Dean, Indiana University Lilly Family School of Philanthropy*

Amir Pasic is the Eugene R. Tempel Dean of the Indiana University Lilly Family School of Philanthropy, the world's first school devoted to research and teaching about philanthropy. Prior to joining the school, Pasic was vice president of international operations at the Council for Advancement and Support of Education (CASE), a global professional association serving educational institutions and their advancement professionals. Previously, Pasic was associate dean for development and strategic planning at the Johns Hopkins University Paul H. Nitze School of Advanced International Studies (SAIS) as well as executive director of its Foreign Policy Institute, where he continues to serve as a fellow. Pasic served as deputy director of the world security project at the Rockefeller Brothers Fund and was deputy vice president for advancement at The George Washington University. A former librarian at the Library of Congress, he began his career with faculty appointments at Brown University's Watson Institute. Pasic earned his doctorate in political science at the University of Pennsylvania. He holds a master's degree in international relations from Johns Hopkins University and a bachelor's degree in economics and political science from Yale University.



### **William Plater**

*Executive Vice Chancellor and Dean of the Faculties Emeritus, Indiana University-Purdue University Indianapolis*

William M. Plater served as the chief academic officer at Indiana University Purdue University Indianapolis (IUPUI) for 19 years (1987-2006), Director of the Office of International and Community Development (2006-10), and retired as Indiana University Chancellor's Professor Emeritus of Public Affairs, Philanthropic Studies, and English in 2010. Earlier, he served as Dean of Liberal Arts at IUPUI (1983-87), Associate Director of the School of Humanities (1977-83 at the University of Illinois at Urbana-Champaign (UIUC), and as Director of Unit One, a residential living-learning program he helped create in 1971, also at UIUC. He served as Senior Consultant for Higher Education Strategies at Epsilon, a New York Times learning technology company, from 2010-2011 and at Course Networking from 2011-2012. He was Senior Advisor for International Affairs at the Western Association of Senior Colleges and Universities from 2012-2014. From 2014 to 2016 he was higher education consultant at Ralph Wolff and Associates, a higher education strategic change practice. He was Research Director for Civic Learning and Community Engagement at Laureate Education, Inc., a global network of more than 70 campus-based and online universities in 25 countries, from 2016-2018. He served as Senior Scholar at



The Quality Assurance Commons for Postsecondary and Higher Education from 2016 to 2021. Plater earned a PhD in English Literature at the University of Illinois at Urbana-Champaign in 1973. He was named a Sagamore of the Wabash by Governor Daniels in 2006. AASCU established the Plater Award for Community Engagement in 2006 as a national honor for provosts. Plater was awarded honorary doctorates by Purdue University (Humane Letters) and the National Institute for Development Administration Thailand (Philosophy) in 2010. He was elected as a member of the Academy of Community Engagement Scholarship in 2022.



**Michael Poliakoff**

*President & Chief Executive Officer, American Council of Trustees and Alumni*

Dr. Poliakoff became part of the ACTA team in March 2010 as the Vice President of Policy, and became ACTA's third president on July 1, 2016. He previously served as Vice President for Academic Affairs and research at the University of Colorado and in senior roles at the National Endowment for the Humanities, the National Council on Teacher Quality, the American Academy for Liberal Education, and the Pennsylvania Department of Education. He has taught at Georgetown University, George Washington University, Hillsdale College, the University of Illinois at Chicago, and Wellesley College. He received his B.A. magna cum laude from Yale University and went on to study at Oxford University as a Rhodes Scholar, and the University of Michigan, where he earned a Ph.D. in classical studies. He has been a junior fellow at the Center for Hellenic Studies, and his research has been supported by the National Endowment for the Humanities, the Deutscher Akademischer Austausch Dienst, and the Alexander Von Humboldt Stiftung. He is the author of numerous books and journal articles in classical studies and education policy and has received the American Philological Association's Excellence in Teaching Award and the Pennsylvania Department of Education's Distinguished Service to Education Award.



**Carol Schuler**

*Editor in Chief of Trusteeship Magazine, Association of Governing Boards of Universities and Colleges*

Carol Schuler is the editor-in-chief of Trusteeship, AGB's award-winning magazine for trustees and other leaders in higher education. Prior to joining AGB, Schuler was the vice president for state council programs and the online course sharing consortium at the Council of Independent Colleges. In this role, she provided to 26 state associations grants and scholarships designed to support collaboration and enhance access and student success at private colleges and



universities. She also developed and led from inception CIC's online course sharing consortium, the largest course-sharing consortium for independent colleges, with more than 300 members worldwide. Earlier, Schuler served for 15 years at Davis & Elkins College in several advancement roles, culminating in her service as vice president for development, when the college accepted its largest gift in history--a \$25 million gift to launch its \$100 million endowment campaign. She has participated in the TIAA Institute's Women's Leadership Forum and earlier served on the CASE District II board and in volunteer roles for CIC's Institute for Chief Academic Officers and the College Media Conference. Her early career was in corporate marketing and advertising. Schuler holds a master's degree in advertising from the University of Illinois and a bachelor's degree in journalism and mass communications from Purdue University.



### **Genevieve Shaker**

*Associate Professor, Philanthropic Studies, Indiana University Lilly Family School of Philanthropy*

Genevieve G. Shaker, Ph.D., is associate professor of philanthropic studies at the Indiana University Lilly Family School of Philanthropy and adjunct professor of liberal arts and of women's, gender, and sexuality studies at the Indiana University School of Liberal Arts at IUPUI. She was an advancement officer for 20 years, most recently as associate dean for development and external affairs for the School of Liberal Arts. Professor Shaker's research focuses on fundraising and fundraisers, workplace philanthropy, philanthropy education, and higher education philanthropy—including faculty work and the public good as well as philanthropic practices within higher education. In 2015 she edited *Faculty Work and the Public Good: Philanthropy, Engagement, and Academic Professionalism* (Teacher's College Press). Her current projects include explorations of the fundraising profession, relationships between donors and fundraisers, unrestricted giving, and continued examination of how higher education contributes to the global common good. She recently published *Fundraising Principles for Faculty and Academic Leaders* (Palgrave, 2021) with co-author Aaron Conley. She is the lead editor of the fifth edition of *Achieving Excellence in Fundraising*, published in 2022. She is associate editor of the journal *Philanthropy & Education* and a fellow of the TIAA Institute and the Tzedakah Institute at Teachers College, Columbia University. Professor Shaker has been recognized for excellence in teaching, mentorship, and research and as a practitioner and member of the university and broader community.



### **Andrea Walton**

*Associate Professor, Indiana University School of Education*

Andrea Walton (she/her/hers), a historian of education, is an Associate Professor in the Department of Educational Leadership and Policy Studies at Indiana University Bloomington. She is also an Affiliate Faculty member of the Lilly Family School of Philanthropy. Walton has been a coordinator of a grant-funded collaborative fellowship program to recruit teachers of color and a member of the National Advisory Committee of the Learning to Give Project (funded by Michigan Council on Foundations and Kellogg Foundation). She has served on the selection committees of National Academy of Education/Spencer and the AAUW dissertation fellowships, on the editorial board of *Philanthropy & Education*, and on the Board of Directors and fundraising committee of the History of Education Society. Walton's research, teaching, and service have cohered around a commitment to equity in education, with a strand of scholarship on the role of philanthropy in shaping colleges and universities and the experiences of various social groups in higher education. Walton's edited volume *Women and Philanthropy in Education* (2005) won the John Grenzebach Prize from CASE as did her 2008 *Philanthropy, Volunteerism, and Fundraising in Higher Education* (co-edited with Marybeth Gasman). In 2021, she was awarded the IU Bicentennial Medal for Service for her role as Bloomington Campus Historian and edited volume *Women at Indiana University: 150 Years of Experiences and Contributions*. Walton holds an A.B. with high honor from Harvard University and both a master's degree in International Educational Development and a Ph.D. in History and Education from Teachers College, Columbia University.



### **Ruth Watkins**

*President, Strada Impact, Strada Education Network*

Ruth V. Watkins is president of Strada Impact, where she leads Strada Education Network's research, philanthropy, thought leadership, and policy efforts to help more individuals access and complete postsecondary education and training to improve their careers and lives. Before joining Strada in 2021, Watkins built a strong reputation for supporting social change and community workforce needs as the 16th president of the University of Utah. In that role, she increased degree completion rates and research funding, established innovative student funding models, and built strong partnerships with community stakeholders. Uniting the campus as "One U," Watkins and her team drove innovation in research, education, and operational efficiency, and addressed major societal challenges, including in mental health and interpersonal violence. Under Watkins' leadership, the University of Utah cultivated broad and deep connections to communities and was responsive to the state's workforce needs. During her

tenure, the university produced more graduates in high-demand fields than any other state institution, and those graduates secured employment or proceeded to graduate or professional school at noteworthy rates. Watkins previously served as the University of Utah's senior vice president for academic affairs for five years before being appointed president. Earlier in her career, she spent 20 years in leadership and faculty roles at the University of Illinois at Urbana-Champaign, where she served as dean of the College of Liberal Arts and Sciences, vice provost, and associate provost. Watkins graduated with highest honors from the University of Northern Iowa with a bachelor's degree in speech-language pathology. She earned a master's degree and a doctorate in child language at the University of Kansas, where she was a National Institutes of Health predoctoral fellow. Her scholarship focuses on communication development and disabilities in young children.



**Meredith Woo**

*President, Sweet Briar College*

Meredith Woo is president of Sweet Briar College. Formerly, she was director of the Global Higher Education Program for the Open Society Foundations, based in London, where her program supported more than 50 colleges and universities over the past 20 years, mostly in the former Soviet bloc countries. Woo previously served as the University of Virginia's dean of the College and Graduate School of Arts & Sciences; held appointments at the University of Michigan, Ann Arbor and Northwestern University; and consulted with the World Bank, the U.S. Trade Representative, Asian Development Bank and the MacArthur Foundation. An expert on international political economy and East Asian politics, Woo has written and edited seven books, and was the executive producer of an award-winning documentary film, "Koryo Saram: The Unreliable People," about Joseph Stalin's ethnic cleansing of Koreans living in Far Eastern Russia during the Great Terror. A native of Seoul who was educated in Seoul and Tokyo through high school, Woo came to the United States to study at Bowdoin College in Maine. She completed her master's and doctoral degrees in international affairs, Latin American studies and political science at Columbia University.

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