



2022 TIAA Institute Women's Leadership Forum

Challenge and inspire. Standing together for change.

Agenda and speaker bios

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2022 TIAA Institute Women's Leadership Forum

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Dear Colleagues:

Welcome to the TIAA Institute's fifth annual Women's Leadership Forum, a distinctive convening of women who share a commitment to leadership excellence and a passion for progress.

This year's theme, *Challenge and inspire. Standing together for change*, speaks to the power women have individually and collectively to shape a brighter, more equitable future for all. Our overarching goal today is to help you harness that power—for yourselves, for those you lead and for one another.

On the pages that follow, you'll find a detailed agenda, biographies of speakers, and links to TIAA Institute studies that examine women's economic challenges, financial capabilities, representation in leadership roles, and future potential for ever-increasing impact. We hope you find these resources valuable.

For nearly 25 years, the TIAA Institute has cultivated new knowledge in support of financial security and well-being for all. The Women's Leadership Forum supports this noble cause, and we thank you for engaging with us.

What a wonderful opportunity to learn from, connect with and be inspired by this community of exceptional women. Enjoy!

Sincerely,

A handwritten signature in black ink that reads "Anne Ollen".

Anne Ollen
Managing Director, TIAA Institute



2022 TIAA Institute Women's Leadership Forum

Challenge and inspire. Standing together for change.

Date	Friday, September 16, 2022
Time	12 to 4:15 p.m. (ET)
Location	Virtual

Agenda

12 p.m.	Welcome Micky Onvural , Chief Marketing and Communications Officer, TIAA
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Change we need: Attitude, aspiration and action

Fifty years after Title IX's passage, we celebrate meaningful progress toward gender equality and acknowledge that shortfalls remain. During this session, we'll discuss where society should focus its future efforts, leaders as change agents, and ways to infuse the spirit of Title IX into attitudes, aspirations and actions that can drive positive outcomes and help close the equity gap.

12:15 p.m.	Moderator: Kourtney Gibson , Chief Institutional Client Officer, TIAA Speakers: Sue Enquist , Former Softball Coach, UCLA Bruins Linda Livingstone , President, Baylor University Tamiko Strickman , Special Advisor to the President and Executive Director, Equity Civil Rights and Title IX Office, University of Michigan
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Change we need: Act on the facts

Gender equity disparities start early, last throughout women’s lives and stubbornly persist—despite decades of national attention. Where do gaps occur? Considering both individual and institutional factors, why do they occur? And what can be done to (finally) rectify the issues? Experts on gender equity will examine ways women and their allies can motivate and facilitate change.

1:15 p.m.

Moderator:

Anne Ollen, Managing Director, TIAA Institute

Speakers:

Jacqueline Bichsel, Director of Research, CUPA-HR

Fawn Cothran, Hunt Research Director, National Alliance for Caregiving

Shelly-Ann N. Eweka, Senior Director, Financial Planning Strategy, TIAA

Andrea Silbert, President, Eos Foundation

Reflection break

Pause, think, act: It’s your financial future

Women on average retire with 30% less retirement income than men, leaving women at greater risk of not being able to retire comfortably when they want—or running out of money after they do. Are you on track for a secure financial future?

2 p.m.

Voices of experience: What would I tell my younger self?

Given what you know today, what advice would you give your younger self? This session features several personal perspectives considering career decisions and trajectories, life goals and ambitions, and opportunities arising from turbulence and change. Speakers will share lessons on impactful leadership and valuing and sharing the special gifts we each possess.

2:15 p.m.

Moderator:

Corie Pauling, SVP, Chief ID&E Officer and Head of CSR, TIAA

Speakers:

Paulette Dillard, President & CEO, Shaw University

Madeline Pumariega, President, Miami Dade College

Yves Salomon-Fernández, Senior Vice President for Operations Planning, Southern New Hampshire University

Gloria Thomas, President, Higher Education Resource Services (HERS)

Change we need: Freedom and the fortitude to be authentic

3:30 p.m.

Carmen Rita Wong's new memoir *Why Didn't You Tell Me?* describes how an immigrant mother's long-held secrets upended her daughter's understanding of her family, herself and her place in the world. In this intimate conversation, Carmen and Micky will explore how a woman's self-perception and how others see her can affect her leadership skills, financial behaviors and definition of success.

Speakers:

Micky Onvural, Chief Marketing and Communications Officer, TIAA

Carmen Rita Wong, Writer, Producer, Nonprofit Board Leader and Personal Finance Expert, Malecon Productions

4:10 p.m.

Closing



Jacqueline Bichsel

College and University Professional Association for
Human Resources (CUPA-HR)

Jacqueline Bichsel has been CUPA-HR's Director of Research since 2015. Jackie received her Ph.D. in cognitive psychology at the University of Alabama and has been doing research in higher education for two decades as both a faculty member and nonprofit researcher. She leads an outstanding research team that continues to take CUPA-HR research in new and exciting directions. They maintain one of the largest workforce databases in existence, collecting, analyzing, and reporting on higher ed salaries, benefits, pay equity, and the representation of women and racial/ethnic minorities in the higher ed workforce.



Fawn Cothran

National Alliance for Caregiving

Dr. Fawn Cothran is the Hunt Research Director at the National Alliance for Caregiving with 15+ years of experience in dementia family caregiving research and related activities. Fawn is a nurse scientist and a board-certified gerontological clinical nurse specialist. She earned a Bachelor of Science in nursing from Howard University in Washington, D.C. Fawn completed a Master of Science in nursing with an emphasis in gerontological nursing and a Doctor of Philosophy, both from the University of Michigan, Ann Arbor. She also completed a Claire M. Fagin Post-Doctoral Fellowship with the National Hartford Centers of Gerontological Nursing Excellence. Fawn is a fellow of the Gerontological Society of America, a member of the National Black Nurses Association and a distinguished educator in gerontological nursing education.



Paulette Dillard

Shaw University

Dr. Paulette Dillard, the 18th President of Shaw University, has a rich teaching history that includes having taught biology for over 20 years at various institutions. The Board of Trustees made her appointment to President permanent after she had served as interim President for a year. Prior to assuming the interim role, Paulette served as Vice President for Academic Affairs, Dean of the College of Arts and Sciences, Department Chair for Natural Sciences and Mathematics, and as an Associate Professor of Biology. She has over 25 years of experience in the field of clinical diagnostic medicine. Although she began her career as a bench scientist, Paulette quickly ascended to the management ranks. She was one of only a few women senior executives and even fewer women of color to reach the rank of Vice President and General Manager in the 1980s. Paulette has used her position as one of the few African American women executives to inspire young people to achieve.

She believes in using her skills and experience in service to the community. Currently, Paulette serves on the Board of the Carolina Small Business Development Fund and the Dorothea Dix Conservancy Board, and she has been involved with both the Innovation and Entrepreneurship Center and the LaunchRALEIGH initiatives since inception. She is on the Board of the Capital City Club and serves on the Raleigh Chamber of Commerce Board of Advisors. Paulette has served previously on the Board of the Nashville Center for Black Family Life, which provided after-school programs for children and youth as well as workshops to teach family life skills. Additionally, she served on the Hospital Corporation of American Center for Nonprofit Management Board working with nonprofit agencies funded by United Way to assist with financial management. Paulette also mentored students as an Executive in Residence at Paine College, Barber Scotia College and Middle Tennessee State University.

She grew up in Mount Airy, North Carolina. Paulette earned a Bachelor of Science degree in biology at Barber Scotia College in Concord, North Carolina, and received a Master of Science degree in biology from Tennessee State University. She went on to earn an M.B.A. from the Jack Massey School of Business at Belmont University and a Ph.D. in biological sciences from Clark Atlanta University (CAU), Atlanta, Georgia.



Sue Enquist

UCLA Bruins

Sue Enquist has spent 39 years as a UCLA student, coach, administrator and instructor. Currently, Sue is an instructor in the UCLA Graduate School of Education - transformational coaching master's program.

As a coach, she holds the highest career win percentage in NCAA Division I Softball (.835). She garnered 11 national championships as a player (1), head coach (3), co-head coach (4) and assistant coach (3).

Sue sits in six Hall of Fames as a player or coach.

She is a leadership consultant for Fortune 100 companies as well as government, education and athletic institutions.

Sue is currently a consultant coach responsible for team cohesion/individual mastery with the USA Olympic Volleyball Team, which captured gold in the 2020 Olympics for the first time in the 60-year history of the sport.

She is founder of ONESoftball.com, a free online community for parents, players and coaches.

Sue owns Bruin Enterprises, LLC., a leadership and business strategies company serving corporate and educational entities.

She is a former pro surfer who is in the water daily.



Shelly-Ann N. Eweka

TIAA

Shelly-Ann Eweka is a nationally known financial planner and well-known speaker who has pushed to narrow the widening gap in retirement savings between genders and different races.

After nearly three decades in financial services, Shelly serves as an expert on the Woman-to-Woman Community section of TIAA.org. Within the firm, she launched a group called Black Indigenous Women of Color Financial Advisors/Planners of TIAA, and she's a member of several other organizations—including ones for Black and female employees—that create leaders and influence culture.

Shelly is frequently quoted by news outlets such as Bloomberg, CNBC, USA Today, Black Enterprise and CNN. She's also been asked to speak at high-profile events designed for female audiences, such as the Women's Institute for a Secure Retirement (WISER) and the 2022 Women's Network Conference, which is run by the N.C. chapter of the American Council on Education (ACE). In addition, she's been part of a financial literacy webinar organized by George Washington University that was attended by national researchers, policymakers and reporters.

Shelly is a member of the Association of African American Financial Advisors, and she chairs the CFP Board's Commission on Sanctions and Fitness and serves on the CFP Board Appeals Commission. She's also an Arbitrator for FINRA and has chaired the Disciplinary and Ethics Commission of the CFP Board.

Shelly received a Bachelor of Science in electrical engineering from the University of Pennsylvania, a Master of Taxation from Northeastern University and a Certificate of Financial Planning from New York University.



Kourtney Gibson

TIAA

Kourtney Gibson is the Chief Institutional Client Officer of TIAA, responsible for serving more than 15,000 retirement plan sponsors in the academic, research, medical and cultural fields and their consultants.

As a member of the TIAA Executive Committee, Kourtney is accountable for the retirement business, leading strategy, sales, relationship, offer and services management, as well as participant consulting and guidance, for TIAA institutional clients. She oversees the team responsible for managing relationships with key industry leaders and advocacy organizations, and is responsible for partnering across the company to deliver the full enterprise to our institutional clients.

Prior to joining TIAA, Kourtney was most recently Executive Vice Chairman of Loop Capital, where she served in a range of leadership roles at the global investment services firm founded in 1997. There, she was responsible for setting long-term strategy and aligning talent and other resources to deepen client relationships and deliver a wide array of outcome-oriented solutions on behalf of institutional clients in more than 80 countries. Over more than 20 years at Loop Capital, Kourtney oversaw various corporate, governmental, institutional and consultant client relations and led multiple functions, including asset management, strategy, sales and trading.

She holds an M.B.A. from the Kellogg School of Management at Northwestern University and a B.B.A. from the University of Miami. Kourtney sits on the boards of trustees at the University of Miami on the Investment Committee and at Viterbo University on the Finance Committee. She is also a director on the boards of lululemon athletica and MarketAxess Holdings.

Her commitment to giving back to the community includes her role as a board member of the Dibia DREAM Foundation, which provides STEM education for underserved youth, and as a board member and Immediate Past Chairman of the Chicago Scholars Foundation, the largest college access and success program in Chicago.



Linda Livingstone

Baylor University

Dr. Linda A. Livingstone is the 15th president of Baylor University. Linda previously served as dean and professor of management at The George Washington University School of Business, as dean and professor of management at Pepperdine University's Graziadio School of Business and Management, and as a tenured faculty member and associate dean of graduate programs at Baylor's Hankamer School of Business.

As Baylor's president, she has overseen the development of Baylor's academic strategic plan, Illuminate, which details Baylor's pursuit of becoming a preeminent Christian research university, and the \$1.1 billion comprehensive campaign that undergirds Illuminate, called Give Light.

A strong voice for the role of faith-based institutions in American higher education, Linda has established herself as a scholar in organizational behavior, leadership, creativity and university accreditation. She has been extensively published and cited in academic and professional outlets including American Business Review, Journal of Organizational Behavior, Journal of High Technology Management Research, and the book Business and Corporate Integrity: Sustaining Organizational Compliance, Ethics and Trust. Linda serves on a number of boards, councils and task forces, including the boards of Baylor College of Medicine, Capital Southwest Industrials, Waco Industrial Foundation, and the Independent Colleges and Universities of Texas, Inc., the Taskforce on Higher Education and Opportunity, and the AGB Council of Presidents. In addition, she serves as the Vice Chair of the Big XII Conference Board of Directors, as the Secretary of the Board of Directors of the American Council on Education, on the NCAA Division I Board of Directors, and on the NCAA Board of Governors.

Linda was inducted into Oklahoma State University's Hall of Fame in 2020. She is a member of the Spears School of Business Hall of Fame, was the first recipient of the Outstanding Ph.D. Alumnus Award, and was recognized in 2015 with the OSU Distinguished Alumni Award.

Linda earned a Bachelor of Science in economics and management, a Master of Business Administration, and a Doctor of Philosophy in management and organizational behavior.



Anne Ollen

TIAA Institute

Anne Ollen develops and executes the TIAA Institute's higher education program. The program seeks to build and share knowledge important to higher education leaders about drivers of change and innovative solutions and strategies in three broad thematic areas: leadership, academic workforce trends and higher education operating models. Anne leverages the Institute's pillars of work—research, partnerships, convenings and strategic communications—to bring distinctive value to Institute stakeholders in alignment with TIAA business priorities.

Her career spans 30+ years of experience in front-line business, marketing, operational and leadership roles at TIAA, where she has built and managed cohesive and productive teams to be agents of change. She was part of the founding team of the TIAA Institute and has shown how strong and inclusive leadership can generate thought leadership that creates business impact and forges influential relationships. Anne helped create and launch several Institute signature initiatives, including the TIAA Institute Fellows Program, the Higher Education Leadership Conference, *Building Expertise* (a professional development program for benefits administrators), and the TIAA Institute Theodore M. Hesburgh Award for Leadership Excellence in Higher Education.

She has a master's in elementary education and has obtained the Certified Employee Benefits Specialist (CEBS) designation.



Micky Onvural

TIAA

Micky Onvural is the Chief Marketing & Communications Officer at TIAA, responsible for leading a global marketing and communications team charged with expanding awareness of TIAA and its dedication to providing lifetime income, and improving clients' experience through digital-first solutions.

Prior to joining TIAA, Micky served as CEO for ecommerce menswear company Bonobos. With more than 20 years of experience as a marketing, product development and business strategy leader, she has held senior leadership roles at eBay, Trulia and Kellogg's. Micky has earned numerous industry awards for innovative marketing and branding campaigns that merged the physical and digital to create immersive experiences.

She holds a bachelor's degree in modern and medieval languages from the University of Cambridge. Micky is a mentor with Student Sponsor Partners, a nonprofit that provides private high school education opportunities to at-risk students in New York City.



Corie Pauling

TIAA

At TIAA since 2006, and in her current role since 2018, Corie Pauling was instrumental in the launch of the ID&E function over 13 years ago and is thrilled to advance TIAA's industry-leading workforce, client and brand engagement around ID&E and CSR, including the launch of the Be The Change platform in 2020. The strategy includes innovative focus and achievements in these areas: client engagement and consultation; workforce analytics/metrics; business diversity; industry thought leadership on wealth gap solutions and numerous emerging issues; pay, mobility and performance equity analytics and strategies; hiring and development best practices; business resource groups and leadership councils; federal contractor compliance; employee engagement; and inclusion learning. She also leads TIAA's Corporate Social Responsibility (CSR) function, which last year led over 160 volunteer projects and \$13M in corporate and workforce giving. Through Corie's groundbreaking leadership and strong enterprise collaborations, TIAA has garnered lauded employer of choice recognition by renowned organizations such as DiversityInc Top 50, Forbes, Working Mother, Fatherly and several others. In her prior role, she held the position of Senior Director, Associate General Counsel in the Employment, Benefits & Labor Law Group, providing trusted counsel for 12 years on a broad range of workforce issues, and she managed employment litigation nationally.

An engaged civic leader, Corie was honored to be listed among the 2021 Elite 100 Black Women leaders by Diversity Woman magazine, the 2020 North America's Most Influential D&I Leaders by Hive Learning, a 2019 Most Powerful Women in Corporate Diversity by *Black Enterprise* and a TIAA Working Mother of the Year by *Working Mother*, and was also a recipient of the Young Civic Leader Award by the Thurgood Marshall College Fund. She now serves on the board of Classroom Central in Charlotte, which provides free school supplies to students and teachers at Title I schools. Corie's prior board posts include the Board of Governors of the North Carolina Bar Association (NCBA) and the Board of the Levine Museum of the New South. She also chaired the NCBA's 500-attorney Labor and Employment Law Section and the Charlotte bar's Diversity & Inclusion Committee.



Madeline Pumariega

Miami Dade College

Breaking through barriers and making history, Madeline Pumariega is the first female president to lead Miami Dade College (MDC), the institution she attended decades earlier as a student-athlete. Her passion for innovation in higher education was born out of her own experiences, first as student and then as a longtime administrator at MDC.

Madeline prioritizes working with business partners to identify the skills needed in key industries and tailoring higher education programs to match those needs. Her transformative approach accelerates the ability of graduates to enter the workforce immediately upon the completion of their coursework.

Prior to becoming MDC's President, she was appointed the first female and Hispanic chancellor of the Florida College System (FCS). In 2019, Madeline became the executive vice president and provost of Tallahassee Community College. She also previously served as president of Take Stock in Children, a nonprofit focused on breaking the cycle of poverty by helping students complete their high school education and advance into post-secondary education and careers.

Madeline's love for academics and service excellence began as a student at Miami Dade College. This led into her 20 years of service at the College in positions of ascending responsibility, culminating in her role as Wolfson Campus President. She views her new role as MDC's president as the opportunity of a lifetime, because it presents her with the greatest ability to serve students who were just like her—looking for a chance to realize their dreams and succeed in the community they love and call home, Miami.



Yves Salomon-Fernández

Southern New Hampshire University

Dr. Yves Salomon-Fernández was born at the tail end of the Gen X decade and grew up straddling two cultures—one at home and American culture as an immigrant. Educated both in the United States and abroad, Yves brings strong levels of cultural dexterity and cultural competence to her work. In 2021, she stepped down from a community college presidency to take a dynamic new role at Southern New Hampshire University (SNHU), an institution of 165,000 students and 15,000 employees. Yves currently serves as Senior Vice President for Operations Planning at SNHU and Interim Executive Director of Kenzie Academy, a boot camp-style ed tech company acquired by the University in 2021.

She is a nationally recognized, entrepreneurial and future-focused thought leader. Her career includes a balance of administration, research and teaching. Internationally, she has served as an election observer with the United Nations in Mexico and a consultant for the Bermuda Ministry of Education. Yves frequently speaks on issues related to higher education, women's advancement, and diversity, equity, inclusion, and belonging.

She currently serves on the Board of Mass Humanities, the American Association of Colleges and Universities, and Double Edge Theater. Yves is a former member of the Federal Reserve Bank of Boston's Community Development Advisory Council. She previously served as a reviewer for the National Science Foundation and Johns Hopkins University Press.

Yves received her undergraduate degree from the University of Massachusetts Boston and holds a certificate from the University of Oxford. Her master's degree is from the London School of Economics and her Ph.D. from Boston College. She is a graduate of Harvard Law School's Program on Negotiation. Yves is fluent in French, Haitian Creole, and Spanish.



Andrea Silbert

Eos Foundation

Andrea Silbert joined the Eos Foundation as its first president in 2007. Eos is a private foundation making charitable investments in efforts to fight hunger and poverty and address structural barriers to gender and racial equity through its Women’s Power Gap Initiative. The WPG Initiative is a data-driven effort to force gender diversity at the chief executive level across sectors by ranking individual companies against one another and finding solutions that “fix the system, not the women.”

Prior to Eos, Andrea was a candidate for Lieutenant Governor of Massachusetts, campaigning on a platform of job creation, economic development and economic justice. In 1995, she founded and served as the first CEO of the Center for Women & Enterprise, one of the nation’s largest nonprofit entrepreneurial training centers. CWE has served tens of thousands of entrepreneurs ranging from owners of small home-based businesses to the founders of fast-growth technology companies such as Zipcar and iRobot.

Andrea began her career as a financial analyst with Morgan Stanley in New York. She left Wall Street for Latin America, working in grassroots economic development in Costa Rica, Columbia and Brazil, and served as a consultant for Women’s World Banking, an international network of microloan funds.

Nationally, Andrea served as the founding Board Chair for the Association of Women’s Business Centers, meeting with congressional leaders to promote legislation to assist women-owned small businesses. In 2000, she was appointed to the National Women’s Business Council, which provides advice to Congress and the President on issues of concern to women entrepreneurs, particularly around access to capital and government procurement. In 2000, Andrea was a co-founder of Springboard Enterprises, a national organization which has helped fast-growth women entrepreneurs raise billions of dollars in angel financing and venture capital.



Tamiko Strickman

University of Michigan

Tamiko Strickman serves as special advisor to the president and executive director of the university's Equity, Civil Rights and Title IX Office at the University of Michigan. ECRT was established in July 2021, replacing the university's existing Office for Institutional Equity, which Tami previously oversaw as the associate vice president for institutional equity. In this role, she was a key leader in helping to institute cultural change and shape new policies, educational programs and organizational structures to better prevent and respond to sexual misconduct. Tami created key alliances with the Flint and Dearborn campuses and co-instituted a new advisory board.

Previously, she was associate to the chancellor for institutional equity and Title IX coordinator at the University of Nebraska-Lincoln. Tami was responsible for all matters involving allegations of discrimination under Title VI and VII of the Civil Rights Act of 1964, the Americans with Disabilities Act and Title IX of the Education Amendments Act of 1972.

In 2016, she founded an alliance of Title IX administrators within the Big Ten Conference, where members discuss issues, practices and policies related to Title IX.

Prior to the University of Nebraska-Lincoln, Tami worked as a prosecutor in Chicago for 14 years, where she handled matters in the divisions of sex crimes and domestic violence, felony trial, juvenile justice, felony review and traffic.

She earned a Bachelor of Arts in Spanish from Miami University in Ohio and a juris doctor from Villanova University School of Law.



Gloria Thomas

Higher Education Resource Services (HERS)

Dr. Gloria D. Thomas was appointed President of HERS (Higher Education Resource Services) in August 2021. Prior to joining HERS, Gloria led two campus-based women's centers—the Carolina Women's Center at UNC Chapel Hill (2016–2021) and CEW (Center for the Education of Women) at the University of Michigan (2009–2016). Prior to these roles, she spent eight years at the American Council on Education (ACE), first as associate director of the ACE Fellows Program (2000–2004) and subsequently as associate director of the former Office of Women in Higher Education (2004–2008). Gloria brings to her current role decades of experience and publications related to women's careers in higher education, especially those from historically marginalized gender identities. She received a Ph.D. in higher education from the University of Michigan; a master's degree in English from Villanova University (PA); and a bachelor's degree in English and Black studies from Swarthmore College (PA).



Carmen Rita Wong

Malecon Productions, LLC

Carmen Rita Wong is a writer and author of the memoir *Why Didn't You Tell Me?* (Crown Penguin, July '22). Carmen is a producer and non-profit board leader, including the boards of The Moth and the Planned Parenthood Federation of America. She is the former co-creator and television host of *On the Money* on CNBC and was a national advice columnist for *Glamour*, *Latina*, *Essence*, *Men's Health* and *Good Housekeeping*, as well as a former faculty professor at NYU. Carmen is the author of a series of novels and two bestselling advice books. She is the founder and CEO of Malecon Productions, LLC, where she develops female-focused media and entertainment.



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.

TIAA Institute is a division of Teachers Insurance and Annuity Association of America (TIAA), New York, NY.

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(08/22)