



# TIAA Institute Fellows Symposium

Higher education leadership: Opportunities for impact

Program

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Dear Colleagues:

Welcome to the TIAA Institute 2023 Higher Education Fellows Symposium! This is a special year for us, as it marks the 25-year anniversary of our founding, and we're delighted you're here to mark it by building and sharing knowledge with us.

Throughout the Institute's history, leadership has been a key focus of our higher education program. What does leadership excellence look like? Who are the people at the helm of U.S. colleges and universities? How do leaders drive positive change? Which leadership challenges are demanding innovative responses? Today, we will share the output of recent Institute collaborations connected with leadership and organizational effectiveness, and we are eager to hear your feedback and ideas.

The TIAA Institute is committed to helping individuals and influencers make informed decisions and prepare for future uncertainties. That's been our mission since 1998, and we couldn't execute it without the help of eminent scholars and leaders like you—difference makers who strive to make the world a better place.

Thank you for your commitment to excellence and for all you do to support the TIAA Institute.

Warm regards,

A handwritten signature in black ink that reads 'Surya P. Kolluri'. The signature is written in a cursive, flowing style.

Surya P. Kolluri  
Head, TIAA Institute

# Fellows Symposium

## Higher education leadership: Opportunities for impact

Speakers in bold

Date	Tuesday, October 10, 2023
Time	11:30 a.m. to 4 p.m. (ET)
Location	@Ease Hospitality 1345 Avenue of the Americas New York, NY 10019

### Agenda

11:30 a.m. to 12 p.m.	Registration, casual lunch and networking in The Gallery
12 to 12:10 p.m.	Guests will be directed into the Oasis Assembly Room to take their seats
12:10 to 12:20 p.m.	<p><b>Welcome</b>  <b>Surya P. Kolluri</b>, Head, TIAA Institute</p> <p><b>Opening remarks via video</b>  <b>Micky Onvural</b>, SEVP, Chief Marketing &amp; Communications Officer, TIAA</p>
12:20 to 1 p.m.	<p><b>College and university presidents: Composition, complexity and the path forward</b></p> <p>There are over 3.9 million employees in the postsecondary sector, making it the 8th largest employment sector in the United States—and the largest employers in many local jurisdictions. The college presidency is complex—and requires one to be many things, including being a chief executive that looks after the well-being of their employees and their financial futures. The American College President Study (ACPS) provides a glimpse into that complexity. Following a presentation of the selected findings from the latest ACPS, discussion will explore the evolving postsecondary landscape and the leadership it requires.</p> <p>Moderator: <b>Anne Ollen</b>, Managing Director, Programs &amp; Operations, TIAA Institute</p> <p>Speakers:  <b>Hironao Okahana</b>, Assistant Vice President and Executive Director, Education Futures Lab, ACE  <b>Danielle Melidona</b>, Senior Analyst, Education Futures Lab, ACE</p>

1 to 2 p.m.

**The war for talent: Creating a strategic Employee Value Proposition**

Whether trying to recruit or retain a president, a dean, a student affairs professional, or a groundskeeper, employers need to figure out who their targeted employees are, what they need and want, what the institution has to offer, and whether compelling alignment is possible. Insights from TIAA Institute research offer a framework for thinking about an institution’s strategic Employee Value Proposition—the mix of tangible and intangible attributes that can help position an institution as an employer of choice.

Moderator:

**Mark Saine**, Managing Director, Client Leadership Development, TIAA Institute

Speakers:

**Paul Yakoboski**, Senior Economist, TIAA Institute

**Kevin McClure**, Murphy Distinguished Scholar of Education and Associate Professor of Higher Education, University of North Carolina Wilmington

2 to 2:15 p.m.

Break, The Gallery

2:15 to 3:15 p.m.

***Hesburgh*: A documentary of Hesburgh’s leadership and legacy  
Clips and conversation**

*Hesburgh*—a *New York Times* “Critic’s Pick” and ranked “one of the best documentaries of 2019” by *Entertainment Weekly*—tells the story of Father Theodore Hesburgh and his leadership in advancing social justice during a pivotal time in American history. Through a partnership with the producers, we aim to foster meaningful conversations across the country around some of today’s critical issues and inspire the next generation of leaders to create positive change in the world. We’ll share a few clips and engage in discussion.

Speakers:

**Stephanie Hale**, Senior Director, Client Leadership Development, TIAA Institute

**Anne Ollen**, Managing Director, Programs & Operations, TIAA Institute

3:15 to 4 p.m.

**Improving longevity fitness to improve retirements**

Understanding longevity is key to successful retirement planning. When workers better estimate how long they might live, they’re better at forecasting retirement income. Institutional leaders have an important role to play in embracing the concept and bringing it forward to employees.

Moderator: **Surya P. Kolluri**, Head, TIAA Institute

Speakers:

**Bret Hester**, General Counsel, Strategy, Policy & Operations, TIAA

**Diane Ty**, Senior Director, Milken Institute Center for the Future of Aging

4 p.m.

**Closing remarks**

**David P. Richardson**, Head of Research, TIAA Institute

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## Mark Becker

### Association of Public and Land-grant Universities

Mark Becker is President of the Association of Public and Land-grant Universities (APLU), a research, policy and advocacy organization dedicated to strengthening and advancing the work of public universities in the United States, Canada, and Mexico.

From January 2009 to August 2021, as president of Georgia State University, Becker led the transformation of GSU from a little known “commuter school” into one of the nation’s premier urban research universities. The university more than doubled sponsored research funding during his tenure and became a national leader in the introduction of innovative programs and initiatives to foster student success.

Prior to Georgia State, Becker held academic appointments at the University of Florida, University of Washington, University of Michigan, and leadership positions at the University of Minnesota and University of South Carolina.



## Stephanie Hale

### TIAA Institute

Stephanie Hale is currently responsible for managing the HR Leadership Exchange (HRLx), a consortium of the chief human resource officers among TIAA’s higher education institutional clients. HRLx helps senior HR leaders expand their perspective, deepen their expertise and transform their leadership within a supportive community of their peers.

In previous roles at TIAA, Stephanie has been heavily involved in the design of TIAA’s premier client conference, TMRW Forum. She has also held roles within HR, building leaders at all levels of the organization. She has managed our frontline manager training program, midlevel leader training program, high potential leader programs, mentoring programs and has served as an executive coach in TIAA’s internal coaching program.

Stephanie is certified to facilitate many leadership development programs such as “The 7 Habits of Highly Effective People,” “Crucial Conversations,” Situational Leadership, StrengthsFinder and diversity and inclusion programs. Stephanie also managed the thought leadership program for TIAA’s Chief Investment Strategist during the recession of 2008-09.



## Bret Hester

### TIAA

Bret Hester is an Executive Vice President and General Counsel for TIAA, responsible for providing legal and strategic advice and guidance and overseeing the legal teams for wealth management, banking, and M&A and corporate strategy and development. TIAA's government relations and public policy team also reports to Bret.

Bret joined TIAA in the fall of 2017 from Barclays, where he led the Washington, D.C., office. He previously served in the U.S. Treasury Department as senior advisor and counsel to the Under Secretary for Domestic Finance and the Assistant Secretary for Financial Markets. He also served as the Acting Deputy Assistant Secretary for Government Financial Policy, responsible for overseeing the \$70 billion Federal Financing Bank and the \$20 billion State Housing Finance Agency Initiative. Bret was awarded the Treasury Secretary's Distinguished Service Award for his contributions to the Department.

Bret is a graduate of Harvard College and Stanford Law School and has also worked as a federal prosecutor, chief counsel to a U.S. Senator, and in private legal practice. He has also been awarded the Safe Haven Award by Immigration Equality for his pro bono immigration work.





## Surya P. Kolluri

### TIAA Institute

Surya Kolluri is head of the TIAA Institute, overseeing research on enhancing lifelong financial security and organizational effectiveness in higher education and the broader nonprofit sector. The TIAA Institute was established 25 years ago to advance TIAA’s long-standing commitment to scholarship and strengthen the company’s partnership with the higher education community. The Institute provides consulting services for institutions and its insights support TIAA clients, consultants and policymakers.

Surya joins the TIAA Institute from Bank of America, where he spent 16 years, most recently as managing director of the Retirement Research and Insights team. Prior to that, he spent 14 years in corporate strategy consulting, first at A.T. Kearney and then Bain & Company. He is an advisor to the Wharton Social Impact Investing Initiative and sits on the boards of the Wharton Pension Research Council and the MA/NH Chapter of the Alzheimer’s Association.

An in-demand public speaker, Surya has presented at the World Economic Forum, Tokyo G20 Summit on Aging and Financial Inclusion, White House Conference on Aging, National Governors Association, Dementia Forum X in Stockholm, World Health Organization Convening on Healthy Aging in Geneva, and the OECD roundtable at Oxford University. He also served on the World Economic Forum Global Future Council on Healthy Aging and Longevity and has spoken on these topics at Harvard, Stanford, Brown, Yale and the University of Pennsylvania.

Surya holds an M.B.A from The Wharton School at the University of Pennsylvania and a master’s in mechanical engineering from Drexel University. He lives with his family in Brookline, Massachusetts.



## Kevin McClure

### University of North Carolina Wilmington

Dr. Kevin R. McClure is the Murphy Distinguished Scholar of Education and Associate Professor of Higher Education at the University of North Carolina Wilmington. He also serves as Director of Public Engagement for the Alliance for Research on Regional Colleges. He is an expert on college leadership, management and finance, especially at broad-access institutions. He is the co-editor of “Regional Public Universities: Addressing Misconceptions and Analyzing Contributions” and “Unlocking Opportunity Through Broadly Accessible Institutions.” Dr. McClure’s public scholarship covers a range of topics, and throughout the pandemic he wrote viral articles on morale, burnout, disengagement, staffing and leadership in higher education. He is currently finishing a book under contract with Johns Hopkins University Press titled “The Caring University: Reimagining the Higher Education Workplace after the Great Resignation.”



## Danielle Melidona

### American Council on Education

Danielle Melidona is a Senior Analyst with the Education Futures Lab at the American Council on Education. Melidona leads a portfolio of activities that provides timely and relevant research and policy analysis to ACE's key stakeholders. She has a depth of experience in working with large scale national data sets (e.g., NPSAS and IPEDS), leading survey research, and preparing accessible data products for institutional leaders and policy makers. Melidona earned a B.A. in communication studies from Kent State University, an M.S. in higher education from Penn State University, and an M.P.P. from Georgetown University.



## Hironao Okahana

### American Council on Education

Hironao Okahana is Assistant Vice President & Executive Director of Education Futures Lab at the American Council on Education (ACE), where he leads ACE's research and institutional transformation portfolio. Prior to joining ACE, he worked at the Council of Graduate Schools for more than eight years, including five as their head of research. A recognized leader at the nexus of postsecondary education research, practice and policy, Dr. Okahana is also a member of the Board on Higher Education and Workforce at the National Academies of Sciences, Engineering, and Medicine (NASEM) and is also currently serving as the 2024 Conference Committee Chair for the Association for the Study of Higher Education (ASHE). Dr. Okahana is an expert on graduate and postdoctoral education, as well as the postsecondary data landscape, and can offer a depth of insight and foresight on enrollment trends, labor market outcomes and diversity and inclusiveness issues. He also often speaks on challenges and trends of the college presidency, including the seminal American College President Study from ACE, and the future of leadership in higher education. Dr. Okahana earned a B.A. in economics from California State University, Long Beach (CSULB), and earned a master's in public policy and a Ph.D. in education from University of California, Los Angeles (UCLA). He is also a higher education program affiliate (with a graduate faculty status) at George Mason University and adjunct assistant professor of education at William & Mary. He resides in Northern Virginia with his wife, Dr. Saleha Bholat, Associate Dean at Northern Virginia Community College, and their two boys (7 years and 11 months old).



## 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 frontline 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 client 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.



## David P. Richardson

### TIAA Institute

David P. Richardson is Managing Director and Head of Research at the TIAA Institute. Before joining TIAA, he served as senior economist for public finance at the White House Council of Economic Advisers and held the New York Life Chair in Risk Management and Insurance at Georgia State University. Previously, he worked as a financial economist in the Office of Tax Policy at the U.S. Treasury and was an assistant professor in the Department of Economics at Davidson College.

Richardson's research interests include public pensions, employer retirement benefit plans and household financial security. He has served as a research fellow for the China Center for Insurance and Social Security Research at Peking University, a research fellow for the Center for Risk Management Research, and a research associate at the Andrew Young School of Policy Studies at Georgia State University. He also is a member of the Pension Research Council Advisory Board, the American Economic Association, the American Risk and Insurance Association and the National Tax Association.

Richardson earned an M.A. and a Ph.D. in economics from Boston College, and a B.B.A. from the University of Georgia.



## Mark Saine

### TIAA Institute

Mark Saine is the Managing Director of Client Leadership Solutions at TIAA. Mark supports our clients by helping them to build leaders internally that are prepared to take on increasingly complex roles and manage the demands of a rapidly changing environment. He provides leadership development services including workshops, retreats, consultation and coaching. In his previous role at TIAA, Mark initiated and oversaw corporate-wide leadership and executive development initiatives such as leadership transitions training, top talent programs, mentoring programs and coaching engagements. Mark's gift for creating relevant and engaging programs created momentum for leadership development inside TIAA that engaged leaders at all organizational levels. Mark has also earned certification from the Hudson Institute of Coaching, is certified to administer the Leadership Circle Profile and Leadership Culture Survey and is a Social Style Master Trainer. Additionally, he holds certifications to train numerous courses including: The Myers-Briggs Type Indicator, Situational Leadership, "The 7 Habits of Highly Effective People," "The Leadership Challenge," "Crucial Conversations" and "Crucial Confrontations."





## Diane Ty

### Milken Institute

Diane Ty is the senior director of the Milken Institute Center for the Future of Aging, where she oversees the strategic direction and operations for the Center's focus on health longevity and financial wellness, and leads its Alliance to Improve Dementia Care. She is a senior advisor at Georgetown University's Business for Impact at the McDonough School of Business, where she previously led multiple consulting engagements in health and financial security and was founding director for its AgingWell Hub and Portion Balance Coalition.

Ty consulted in marketing, strategy, and business development for Service Year Alliance, Generations United, and the Silicon Valley startup Super. She was senior vice president of strategic market development at AARP, where she architected the organization's under-50/Millennial strategy. The work was recognized with a gold-level International Design Excellence Award in design strategy. She also led the development of AARP's Social Security and retirement calculators. As vice president of strategic alliances at AARP Services, she designed and negotiated cross-organizational corporate partnerships. Ty led Save the Children's Millennial-focused work as managing director of US programs and orchestrated the Effie-winner and Emmy-nominated Ad Council campaign "Do Good: Mentor A Child."

Ty began her career at the American Express Company, holding several marketing positions, including vice president of corporate card marketing, over her 10+ year tenure. She earned a BA from Duke University and was a Lauder Institute fellow at the University of Pennsylvania, earning an MBA from the Wharton School and an MA from the School of Arts and Sciences. Ty serves on the board of Capital Caring Health and is a gubernatorial appointee on the Maryland State Commission on Aging.



## Paul J. Yakoboski

### TIAA Institute

Paul Yakoboski is a Senior Economist with the TIAA Institute. His research agenda focuses on financial literacy and wellness, retirement saving and investing, the retirement decision and asset management during retirement. Yakoboski also conducts research on workforce issues in the higher education and nonprofit sectors. He leads the Institute's survey research program and is director of the Institute's Fellows Program.

Prior to joining the TIAA Institute, Yakoboski held positions as Director, Policy Research for the American Council of Life Insurers, Senior Research Associate with the Employee Benefit Research Institute and Senior Economist with the U.S. Government Accountability Office. He previously served as Director of Research for the American Savings Education Council and was an adjunct instructor at Nazareth College.

Yakoboski is a member of the American Economic Association and the National Academy of Social Insurance. He also serves on the board of the *Journal of Retirement*, the editorial advisory board of *Benefits Quarterly* and the Society of Actuaries Committee on Post-Retirement Needs and Risks. Yakoboski earned his Ph.D. and M.A. in economics from the University of Rochester and his B.S. in economics from Virginia Tech.

## Thought leadership on higher education

### College and university presidents: Composition, complexity and the path forward

- [American College President Study 2023](#)
- [New workplace agreements create opportunities for a more diverse faculty](#)
- [Fix the system, not the women: Women's Power Gap Initiative](#)
- [Women in the higher ed workforce will never achieve pay equity without increased representation in leadership](#)
- [A path toward equity for women faculty in higher education](#)
- [How to recognize and respond to genuine trends with significant implications for your institution](#)
- [Critical competencies for leading major institutional restructuring in higher education \(aka Big Scary Change\)](#)
- [A pandemic opportunity? Reassessment of institutional patterns and practices](#)

### The war for talent: Creating a strategic Employee Value Proposition

- [Why would someone want to work for my college or university?](#)
- [A closer look at fringe benefits for faculty | Institute \(tiaa.org\)](#)
- [Responding to job hunting among higher ed employees](#)
- [Employment volatility in the academic workforce: Implications for faculty financial and retirement plans](#)

### *Hesburgh*: A documentary of Hesburgh's leadership and legacy Clips and conversation

- [2023 Hesburgh Award Brochure](#)

### Improving longevity fitness to improve retirements

- [An unrecognized barrier to retirement income security: Poor longevity literacy](#)
- [Preparing for 100-year lives](#)
- [Financial well-being and literacy in a high-inflation environment](#)
- [Longevity perceptions and implications for financial decision-making: Racial and ethnic differences](#)
- [Financial wellness among the higher education workforce](#)
- [Want to know when you can retire?](#)
- [How the pandemic altered Americans' debt burden and retirement readiness](#)
- [Differences in retirement preparedness and security by race and ethnicity](#)

# Celebrating 25 years

## Informing research: From insights to outcomes

Leaders in the education, nonprofit and public sectors turn to the TIAA Institute for objective, actionable information to make better, more informed decisions. Through our world-class research, expert analyses, convenings, award programs and collaborations, we build and share knowledge to help advance real-world solutions to complex problems.

### Driving thought leadership



**Financial security**  
 Financial literacy and wellness  
 Longevity and lifetime income  
 Retirement plan design  
 Behavioral finance



**Higher education**  
 Recruitment, retention and talent development  
 Academic workforce trends  
 Diversity, equity and inclusion (DE&I)  
 Organizational effectiveness

### Recognizing excellence

#### The TIAA Paul A. Samuelson Award

For outstanding scholarly writing on lifelong financial security



#### The TIAA Institute Theodore M. Hesburgh Award

For leadership excellence in higher education



### Trusted source of knowledge

**50+ Fellows**—nationally recognized scholars and subject matter experts with deep knowledge and experience in financial security and higher ed issues

#### In-house economists

**Strategic collaborations**—engagements with research centers, industry associations, policy organizations, think tanks

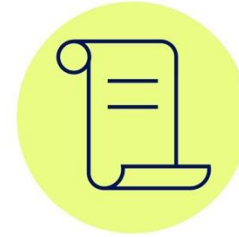
## Building and sharing knowledge



Fellows symposia  
Convenings



Insights reports  
Data briefs



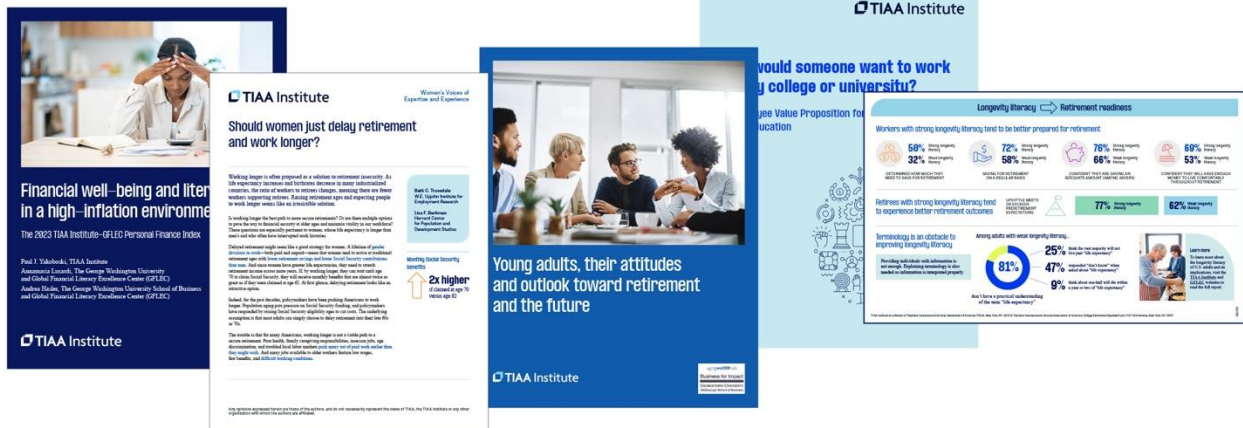
Academic studies  
Infographics

## Special topics

**TIAA Institute-GFLEC Personal Finance Index:** provides a comprehensive barometer of U.S. adults' readiness to make sound financial decisions

**Voices of Expertise & Experience:** insights to inform responses to COVID-19's impact on financial security and higher education

**Women's Voices of Expertise & Experience:** insights to help retire inequality featuring brief commentaries written by women leaders and scholars



## Making a difference: Achieving outcomes that matter





## 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](https://tiaainstitute.org).

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

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