

# Lucie Lapovsky

1281 Gulf of Mexico Drive #1104  
Longboat Key, FL 34228  
Tel: 917- 690-1958  
e-mail: lucie@lapovsky.com

---

## **Education:**

- Ph.D. University of Maryland, College Park, Maryland, in Economics, 1981
- M.A. University of Maryland, College Park, Maryland, in Economics, 1974
- B.A. Goucher College, Baltimore, Maryland, Economics, 1972

## **Other Educational Experiences:**

- Duke University, Directors' Education Institute, 2007
- Harvard University, Program for New College Presidents, 1999
- Baltimore County Leadership Program, 1991
- Harvard University, Institute for Educational Management, 1987

## **Honors and Awards:**

- American Council on Education (ACE) Donna Shavlik Award for sustained and continuing commitment to women's advancement in higher education - 2016
- Named Alumna of the Year by Packer Collegiate Institute in Brooklyn, NY - 2009
- Recipient of the Corporate Excellence Award by the Institute of Applied Human Dynamics, St. Jude Rehabilitation Institute - 2002
- Recipient of the Dr. Carol S. Russett Award by the Westchester Rockland Region of the ACE/National Network of Women Leaders - 2002
- Named one of Maryland's Top 100 Women by the Daily Record - 1999
- Named Outstanding Woman Leader by the Maryland ACE/National Network of Women Leaders - 1998

## **Consulting and Evaluation Activities:**

Since July, 2004, she has undertaken a variety of consulting projects with independent K-12 schools and colleges and universities around the country and in Japan. Projects focus on issues relating to cost and efficiency, access with a concentration on pricing and discounting, governance, strategic planning and issues relating to endowments and endowment management. She also has been an expert witness in a few educational related cases and she undertakes a limited number of executive searches for chief financial officers. Clients include National Association of Independent Schools, Claremont Graduate University, Kiski School, Loyola University New Orleans, Drew University, Mills College, College of Saint Scholastica, Fort Lewis College, University of the Sacred Heart in Puerto Rico, Spelman College, Kirkland and Ellis and Nomura Securities to name a few. She also leads evaluation visits for the Middle States Association.

### **Chief Financial Officer Searches**

Each year, she undertakes a limited number of executive searches for college and university chief financial officers. Searches have been conducted for Pitzer, Sweet Briar, Randolph, Lewis and Clark, Goucher College, The College of Wooster, University of the Sciences, Drew University, Mills College and many others.

### **Research Projects:**

Since 2004, she has undertaken several research projects relating to access to higher education, to pricing and discounting, to costs and to endowment and endowment management. The research has been supported by grants from the Lumina Foundation, Jobs for the Future, the College Board, the University of Tokyo, the Common Fund and the Association of Governing Boards.

### **Teaching Experience:**

She periodically teaches courses in economics and higher education at various institutions including NYU, Mercy College, Goucher College, Hood College and Morgan University. She serves on dissertation committees at the University of Pennsylvania and Creighton University.

### **Administrative Experience:**

#### **7/99- 7/2004 Mercy College. President**

**Dobbs Ferry, NY**

Mercy College is an institution of more than 10,000 students with six campuses in New York City, Westchester and on-line with a budget in excess of \$100 million. The college is known as a student centered institution which offers access to students from a wide variety of backgrounds. The college offers associate, bachelors and masters degrees in more than 80 programs. Major accomplishments while at Mercy included the following:

- More than doubled the graduation rate and the number of degrees awarded during these five years; more than 3200 degrees were awarded in 2003-04.
- Significantly increased student success by changing admissions standards to accept only those with a reasonable probability of success and restructuring the curriculum to stratify it so that students progressed in a systematic way that was consistent with their skill levels.
- Completed the college's first successful capital campaign raising more than \$11 million for the Bronx campus in just over one year and significantly increasing the annual fund raising at the college.
- Opened new campuses in Manhattan and the Bronx. Completed both projects on schedule and on budget.
- Increased the college's visibility and reputation.

#### **7/90 – 6/99 Goucher College, Vice President for Finance**

**Baltimore, Maryland**

Goucher is a liberal arts college with an enrollment of more than 1,000 students. As a member of the senior staff of the college, actively involved in all college operations including the \$40 million capital campaign, annual giving, strategic planning, and student recruitment and retention activities.

- Responsible for long-range financial planning, budget development and control, human resources, technology, facilities management, construction projects and endowment management.
- Liaison from Goucher to the Maryland legislature and the state. Staff to the Finance, Investment, Audit, Technology, and Buildings and Grounds Committees of the Board of Trustees.
- Spearheaded the collaboration among all the colleges in the Baltimore area to make Baltimore a "College Town" including getting a grant from the Teagle Foundation to support the project.

9/89 – 7/90 **University of Maryland at College Park**

**College Park, Maryland**

**Special Assistant to the President**

Flagship research campus of the University of Maryland System with more than 40,000 students.

- Responsible for design and development of a comprehensive accountability plan for the campus which included goals and indicators of progress relative to teaching, research, and public service.
- Developed indicators of management effectiveness relative to leadership, campus productivity, and the efficient and effective allocation of resources.
- Special attention was focused on student retention. New programs were developed to increase student success

12/76 – 9/89 **Maryland Higher Education Commission**

**Annapolis, Maryland**

(formerly State Board for Higher Education)

Coordinating/governing board for all colleges and universities in Maryland

3/80 – 9/89 **Director of Finance and Facilities**

7/78 – 3/80 **Coordinator of Financial Planning**

12/76 – 7/78 **Finance Specialist**

- Responsible for all recommendations for Board submission to the Governor and Legislature concerning higher education finance and facilities in Maryland. This included funding policies, facility construction and renovation policies, salary policies, tuition and financial aid policies and energy conservation strategies.
- Administrator of the State's \$20 million Aid to Independent Institution Program and \$3 million Interstate Compact Program. Chaired and served on many task forces and committees with representatives of faculty and staff from all institutions and segments of higher education.

4/85 – 7/85 **Interim Director State Scholarship Board**

**Baltimore, Maryland**

**(On loan from the Higher Education Commission)**

- Responsible for overseeing the awarding of all Maryland state scholarships
- Responsible for overseeing the competition to choose Maryland's Distinguished Scholars in the Arts

5/74 – 12/76 **Fiscal Planner**

**Annapolis, Maryland**

**Department of Budget and Fiscal Planning**

- Responsible for the analysis of long and short range fiscal needs of State programs and corresponding revenue availability.
- In consultation with concerned agencies, forecast and made recommendations to the Governor on the administrative and budget implications of proposed legislation.
- Designed and maintained two computer models of the Maryland personal income tax system: an econometric model and a simulation model.

**Consulting Clients:**

**Academic Impressions – Workshops and webinars on leadership, planning and finance (2004 – present)**

**Academy for Educational Development - International Visitor Project (1994)**

**Adler University – Strategic Finances (2019)**

**Agnes Scott – CFO Search - (2018)**

**Alaska Pacific University – Review of Academic Costs and Pricing – (2012 – 14)**

**Albright – Interim Vice President for Finance and Administration search (2020)**

**Alverno – Tuition Pricing and Discounting – (2018)**

**Ameresco – Energy Saving Consult (2017-18)**  
**American Council on Education – Senior Leadership Retreat (2010)**  
**American University of Paris - Tuition Pricing and Discounting (2013-2014)**  
**Andrew College – Tuition Pricing and Discounting (2019 – present)**  
**Association of Governing Boards - Various consulting and board retreat assignments (2004-2013)**  
**Ball State University – Tuition, Discounting and Enrollment Management (2005)**  
**Baylor University – Tuition, Discounting and Enrollment Management (2005)**  
**Bennington College – Vice President for Finance and Administration search – (2014)**  
**Biola University – Enrollment Management – (2018-2019)**  
**Bridgewater College – Strategic Planning – (2011)**  
**California Institute of the Arts – Search – (2020)**  
**Cabrini College – Board Retreat on Pricing – (2015)**  
**Canadian Memorial Chiropractic College – Board Leadership Retreat (2006)**  
**Carthage College – Board Governance Retreat – (2012) CFO Search (2018) Board Conversation (2019)**  
**Cheshire Academy – Tuition Pricing – (2020-2021)**  
**Claremont Graduate University – Board Conversation on Pricing – (2019)**  
**Clarkson University – Board Discussion on Pricing (2007)**  
**College of Notre Dame of Maryland – CFO searches – (2010 – 2011, 2014 and 2016)**  
**College of Saint Mary (Nebraska) – Pricing and Discounting – (2011)**  
**College of Saint Scholastica – Cost Saving and Tuition Discounting – (2012)**  
**College of Wooster - Vice President for Finance and Administration, Treasurer search (2014)**  
**Cornell College (Iowa) – Board Retreat on Pricing and Discounting (2015)**  
**Council of Independent Colleges – Various Presentation (2005 – present)**  
**Dickinson College – CFO search with Witt/Kieffer – (2010 – 2011)**  
**Dominican University of CA – CFO search – (2019)**  
**Dominican University in Illinois – Tuition Discounting and Pricing (2007), CFO search (2017)**  
**Drew University –Finance searches (2012, 2015, 2016, 2017) and Board Governance Retreat (2013)**  
**Tuition Pricing (2018)**  
**Earlham – CFO search - (2017)**  
**Elizabethtown – Tuition Pricing and Discounting – (2017 - 2018)**  
**Fairleigh Dickinson – Tuition Pricing and Discounting – (2019 – 2021)**  
**Felician University –VP of Finance search (2016)**  
**First Marblehead – Strategic Planning on Student loans (2004 – 2006)**  
**Flagler College – Financial Reporting and Price and Enrollment – (2013)**  
**Fort Lewis College – Strategic Planning – (2011)**  
**Goldey Beacom – Price Reset (2019 – 2020)**  
**Gordon College – Price Reset (2015-16)**  
**Goucher College – Vice President for Finance and Administration search (2014)**  
**Hastings College – Advisor to Board Chair, Strategic Finance (2009-2012)**  
**Hiram College – Price Consult (2018-19)**  
**Hispanic Association of Colleges and Universities – Mission Development (1993-94)**  
**Higher Ed Leadership Institute – Saudi Arabia – Leadership Training (2016)**  
**Illinois Wesleyan College – Financial Strategy - (2020-present)**  
**Indiana Private College Association - Tuition Discounting Talk to the Board (2004)**  
**Institute for Higher Education Policy (Gates Funded), Cost of Community College Completions – (2013)**  
**Japanese Educational Foundation – (2020 – present)**  
**Jessie Ball DuPont Fund – Board Retreat on Financing Higher Education – (2013)**  
**Kenyon College – Board Retreat on Cost and Pricing (2012)**  
**King’s College – CFO search (2019)**

**Kirkland and Ellis – Expert Witness on Maryland Desegregation Cast** (2016-present)  
**Kiski School – Price Reset** (2019)  
**LaSalle – Price Reset** (2015-16)  
**Lebanon Valley College – Interim Vice President for Finance and Administration –** (2013)  
**Lewis & Clark College – CFO search** (2014 – 2015)  
**LIM – AVP search** (2018-19), **VP search** (2019)  
**Louisiana Board of Regents - Funding Equity** (1987-88)  
**Loyola New Orleans – Strategic Finances** (2015)  
**Magna Publications – Various webinars on cost, discounting and enrollment mgt. –** (2006- 2011)  
**Manchester College (Indiana) - Board Leadership Retreat** (2007), **Presidential Compensation** (2010)  
**McMurray College – Board Conversation on Price and Discount Strategies** (2019)  
**Midland University – Advisor to President, Strategic Finance** (2009-2014)  
**Mills College – Strategic Financial Issues, Enrollment Management, CFO search, Board Governance Retreat** (2005 - 2011)  
**NACUBO – Chief Financial Officer Census** (2009 – 2010)  
**National Association of Independent Schools – Tuition Pricing and Resets** (2020)  
**Nomura Securities - Strategic College Finances** (2005 – present)  
**Northwestern University of Health Sciences – CFO Search** (2017-18)  
**Notre Dame of Maryland University – Searches for VP for Finance and Interim VP –** (2011 and 2014), **Financial Consult** (2018-present)  
**Pennsylvania College of Art and Design – Strategic Plan** (2007)  
**Philadelphia University – Board Strategic Planning Retreat –** (2012)  
**Pitzer – CFO Search** (2018)  
**Point Park University- Tuition Pricing –** (2016-17)  
**Portland State University – CFO search with Witt/Kieffer –** (2011)  
**Randolph Macon Women's College - Review financial model** (2006)  
**Randolph College – Vice President for Finance, Administration and Treasurer search –** (2013, 2018)  
**Saint Bonaventure University – Board Leadership Retreats** (2006 and 2009)  
**Saint Mary’s College (IN) – Vice President for Finance and Administration search** (2012)  
**Sarah Lawrence College – Interim Vice President for Finance and Administration** (2012)  
**Spelman College- New Board Member Orientations** (2006, 2008, 2011)  
**St. Louis College of Pharmacy - Board Enrollment Management Retreat** (2006)  
**Stamats - Pricing and Discounting and Cost Analysis Projects** (2013 - 2014)  
**Sweet Briar – CFO search –** (2017-18)  
**Thiel College – CFO search –** (2020 – present)  
**TIAA-CREF Institute - Paper on Cost Savings** (2013)  
**Trinity Washington University – Vice President for Financial Affairs search** (2016)  
**University of Findlay – VP for Finance search** (2015-2016)  
**University of the Health Sciences – VP for Finance interim search and search** (2013)  
**University of Montevallo - Pricing and Revenue Analysis** (2014- present)  
**University of the Sacred Heart (San Juan, Puerto Rico) – Board Leadership Retreats, work with the President and his cabinet on strategic issues** (2007- 2013)  
**University of Tokyo – Strategic College Finances** (2008 – 2010)  
**University System of New Hampshire – Board Retreat on Cost and Productivity** (2007)  
**Ursinus- Interim CFO Search** (2016)  
**Vaughn College of Aeronautics - Board Strategic Finances** (2006)  
**Victory University – Advisor to the President –** (2011- 2013)  
**Viterbo – Tuition Pricing and Discounting –** (2018)  
**WASC – President and Board Retreat -** (2018)

**Wesleyan College (Georgia) – Board Leadership Retreat (2007)**  
**Wheaton College – Board Retreat on Pricing and Liberal Arts Education – (2013)**  
**Willamette College – Price Reset (2019-2020)**  
**William Jewell College – Price Reset (2020)**  
**Winklevoss – Work on SimMetric product (2009–2011)**  
**York College - Strategic Planning and CFO Search (2014- present)**

### **Evaluation Activities**

#### **Middle States Commission on Higher Education institutional evaluation teams:**

American University in Paris – special visit (2012)  
Cheyney University – chair special visit (2009)  
Tai Sophia – chair special visit (2008)  
Southeastern University – special visit (2007)  
Wilmington College – chair of team (2004-05)  
Pontifical Catholic University of Puerto Rico - (2003)  
American University in Rome – chair of team (2002)  
Ursinus College – (1999)  
Elmira College – (1993)  
Juniata College – (1992)  
College of New Rochelle – (1991)

#### **Virginia Council for Higher Education evaluation team –**

Christopher Newport College's Master of Education Program

### **Research Projects:**

**National Association of Independent Schools – Price Resets (2020)**  
**Lumina Funded project on colleges that have reduced tuition – (2014 - 2016)**  
**Cost Project supported by Lumina Foundation (2010-2012)**  
**Benchmarking Women’s Leadership for the White House Project (2009 – present)**  
**Consortia paper supported by Jobs for the Future (2007 – 2008)**  
**Endowment Project supported by the University of Tokyo and Nomura Securities (2009)**  
**Endowment Project supported by the Common Fund (2007 – 2009)**  
**Consumer Response to Tuition and Financial Aid supported by the Lumina Foundation (2005 – 2008)**  
**Association of Governing Boards – College Cost Project (2005 – 2006)**

### **Teaching Experience:**

**Dissertation Reviewer**, Creighton University (2018 - present), University of Pennsylvania (2015-present)  
**Lecturer in Education**, Steinhardt School at NYU (2008)  
**Faculty in Economics**, Mercy College, (2000-present)  
**Lecturer in Economics**, Goucher College, (1993-1999)  
**Guest Faculty**, Hechinger Institute of Journalism, Teacher’s College, Columbia University, (1997-2000)  
**Faculty**, HERS Institute at Bryn Mawr College, (1997- 2005)  
**Guest Faculty**, University of Maryland at College Park - Member of Doctoral Dissertation Review Committee, (1995)  
**Lecturer in Doctoral Education Program**, Morgan State University, Baltimore, Maryland, (1987)  
**Lecturer in Economics**, Hood College, Frederick, Maryland, (1985-1987)

### **Selected Board Service**

**Education Foundation of Sarasota** – 2020 – present  
**Asolo Theatre** – 2020 - present  
**University of Maryland Economic Leadership Council** – 2020-present  
**International Women’s Forum – Florida Suncoast** – President (2021 – present) 2019 - present  
**KnowledgeWorks Foundation** (chair 2018- 2021) 2010 – 2021  
**American Public University System Board of Trustees** (chair student affairs committee) 2004 – present  
**Tuition Exchange Board**, (Treasurer 2002-present) 1998-present  
**Cedar Crest College** (member Executive committee and chair, audit committee) 2010 – 2019  
**College Board** – member of the audit committee – 2014 - 2018  
**Re:Gender, formerly National Council for Research on Women Board**, (Board chair 2010 -2016, previously, chair of finance, audit and investment committees) 2003-2016  
**New Tech Network** 2014 – 2015  
**HERS Board** (treasurer and chair Finance and audit committee) 2006 - 2014  
**Institute for Higher Education Policy** (member finance and governance committees) 2010 - 2013  
**The White House Project**, (treasurer) 2004 – 2013  
**Goucher College Committee of Visitors**, 1999-2014  
**Western New England College Board**, (member audit and academic affairs com.) 2002-2011  
**Packer Collegiate Institute Board of Trustees**, (chair faculty and staff comp committee) 2001-2010  
**Women’s Forum Education Fund Board/Advisory Committee**, 2004 - 2007  
**Westchester County Association, Executive Committee**, 2000-2004  
**Middle States Association of Colleges and Schools**, (Treasurer)1998 -1999  
**Columbia Foundation Board of Trustees**, 1998-1999  
**McDonogh School Board of Trustees**, 1995-2002  
**Foreign Information and Referral Network Board of Trustees**, 1994-1999  
**Baltimore County Police Assistance and Relief Fund Board of Trustees**  
(Treasurer), 1993-1996  
**Alliance Board of Trustees**, 1994-1996  
**Executive Board for the American Council on Education National Identification Program**, 1992-2002 (chair 1992-1997)  
**American Council for Education's Commission for Women** (ex officio), 1992-1997  
**Montebello Rehabilitation Hospital Board of Visitors**, 1992-1994  
**University of Maryland Women's Forum, Vice Chair** 1989-1990  
**Maryland Teachers and State Employees Supplemental Retirement Plans Board of Trustees**, appointed by the Governor 1986-1989  
**Maryland National Identification Program Board** 1986 - 2002

**Selected Committees/Task Forces:**

**Magna Publications Editorial Board**, 2007 - 2012  
**Association of Governing Boards Cost Task Force**, 2007 - 2009  
**Common Fund Benchmark Advisory Committee**, 2006 - 2012  
**First Marblehead Advisory Committee**, 2000-2005  
**American Council on Education, Advisory Committee to the Center on Policy Analysis**, 2003-2006  
**Lumina Foundation Academic Advisory Council**, 2001-2003  
**Association of Governing Boards Outstanding Trustee Award Committee**, 2000-2004  
**Tuition Plan Inc. Member of the Plan Design Committee**, 1998-1999  
**National Association of College and University Business Officers: Benchmarking Project Committee** (1996)  
**IPEDS Data Revision Task Force**, Appointed by NACUBO, 1995-1997  
**National Association of College and University Business Officers, Tuition Discounting Task Force** 1994-2000, (Chair

1998-2000)

**EACUBO Senior Business Officer's Round Table Planning Committee** (1994-1999, chair 1998)

**Columbia Association Budget Committee**, 1989-1991

**Working Group, Revision of National Facilities Manual** - Appointed by Center of Education Statistics, 1989 - 1991

**Chair, Planning Committee, American Council on Education** - Maryland National Identification Program, 1988-1991

**Advisory Panel on Postsecondary Education to the Center for Education Statistics**, 1987-1997

**Grapevine National Advisory Committee**, 1987 – 1989

**Maryland Teachers and State Employees Supplemental Retirement Plans Board of Trustees**  
Appointed by the Governor, 1986-1989

**Task Force on Revision of Higher Education Finance Survey** - Appointed by NACUBO, 1986 – 1987

### **Books**

**The White House Project: Benchmarking Women's Leadership** edited with Deborah Slaner Larkin, November 2009

**Strategic Financial Challenges for Higher Education: How to Achieve Quality, Accountability and Innovation** edited with Donna Klinger, New Directions for Higher Education, Number 140, Jossey Bass, March, 2008

**Roles and Responsibilities of Chief Financial Officers**, edited with Mary McKeown-Moak, New Directions in Higher Education, Number 107, Jossey Bass, Fall, 1999

### **Selected Publications:**

**Blogs on Forbes periodically** 2014 – present

**"Reimagine Tuition: Three Considerations for Independent School Tuition Setting,"** National Association of Independent Schools, November 2020

**"Do Price Resets Work,"** April, 2019

**"Price Reset: Considerations, Concerns and Implementation Tactics,"** Octane, Spring, 2019

**"Let's End the Insanity in College Pricing"** Money Magazine, January 15, 2016

<http://time.com/money/4178749/end-insane-college-pricing/>

**"Tuition Reset: An Analysis of Eight Colleges that Addressed the Escalating Price of Higher Education,"** supported by the Lumina Foundation November 2015

**"The Higher Education Business Model: Innovation and Financial Sustainability,"** published November 2013 by TIAA-CREF, available online at <https://www.tiaacrefinstitute.org/public/pdf/higher-education-business-model.pdf>

**"How Can Your Institution Be More Cost Effective,"** in Association of Governing Board's Trusteeship July/August 2012

**"What is the Net Price Calculator: What do Boards Need to Know,"** in Association of Governing Board's Trusteeship May/June 2011

**"Designing a Net Price Calculator"** in *Inside Higher Education*, March 4, 2011

**"Tuition Discounting: Institutional Aid Patterns at Public and Private Colleges and Universities, 2000-01 to 2008-09"** with Sandy Baum and Jennifer Ma published by the College Board, August, 2010

**"The 2010 Profile of Chief Finance Officers"** with Ken Redd published by the National Association of College and University Business Officers, July, 2010

**"What's the State of Investment Committees Today"** in Association of Governing Board's Trusteeship May/June 2010

**"Risk Forecast"** in the Business Officer, March 2010

**"Endowment Spending: External Perceptions and Internal Practices"** Commonfund White Paper, March, 2009



**“Cap(itol) and Gown”** in **Mission Matters** published by the Commonfund Spring/Summer 2009

**“Endowment Spending: External Practices and Internal Perceptions”** White Paper published by the Commonfund Institute, March, 2009

**“Rethinking Student Aid for Nontraditional Students”** in **The Effectiveness of Student Aid Policies: What the Research Tells Us**, edited by Sandy Baum, Michael McPherson and Patricia Steele, College Board, 2008

**“Critical Endowment Policy Issues”** in **Strategic Financial Challenges for Higher Education: How to Achieve Quality, Accountability and Innovation** edited by Lucie Lapovsky and Donna Klinger, **New Directions for Higher Education**, Number 140, Jossey Bass, March 2008

**“Do You Know Who is Dropping Out? Three Regression-Analysis Case Histories”** in **Recruitment and Retention in Higher Education**, August 2007 Volume 21 No. 8

**“A Board’s Primer on Bond Ratings”** in **Trusteeship**, July, August 2007

**“Endowments at U.S. Colleges and Universities”**, **Todai-Nomura Discussion paper No. 3**, Nomura 2007 (in Japanese)

**“Engaging Boards in Conversations About College Costs”** published by the Association of Governing Boards, November 2006

**“Tuition Discounting: Not Just a Private College Practice”** with Sandy Baum published by the College Board, August 2006

**“An Alternative Approach to Finding Presidents”** in **Inside Higher Education**, May 12, 2006

**“The Best-Laid Succession Plans”** in **Trusteeship**, Jan/Feb. 2006

**“The Economic Challenges of Liberal Arts Colleges”** in **Liberal Arts Colleges in American Higher Education**, American Council of Learned Societies Occasional Paper, no. 59, 2005

**“Financial Aid: Does it Matter Whether it’s Funded: No”** with Loren Loomis Hubbell in **NACUBO Business Officer**, July 2005

**“By the Numbers: Tuition Discounting”** with Loren Loomis Hubbell in **NACUBO Business Officer**, June 2005

**“Tuition Discounting: 15 Years in Perspective”** with Loren Loomis Hubbell in **NACUBO Business Officer Online Exclusive**, June 2005

**“Tuition Discounting and Prudent Enrollment Management”** Association of Governing Boards of Universities and Colleges **Priorities Series**, Number 24, Fall 2004

**“Expanding the Higher Education Gateway”** with Loren Loomis Hubbell in **NACUBO Business Officer**, September, 2004

**“Rethinking Policy, Process, and Planning to Redefine Quality and Enhance Student Success”** with Joanne Passaro, Louise H. Feroe, and James R. Metzger, in **Changing Student Attendance Patterns** edited by Jacqueline King et.al. Number 121, Jossey-Bass Spring, 2003

**“Tuition Discounting Continues to Grow”** with Loren Loomis Hubbell in **NACUBO Business Officer**, March, 2003

**“Enrollment Management and Tuition Discounting”** with Loren Loomis Hubbell in **Educational Considerations**, Fall 2003

**“Tuition Discounting in Challenging Times”** with Loren Loomis Hubbell in the **NACUBO Business Officer**, February, 2002

**“Using Benchmarking to Influence Tuition and Fee Decisions,”** with Loren W. Loomis Hubbell and Robert J. Massa in **Using Benchmarking to Inform Practice in Higher Education** edited by Barbara E. Bender and John H. Schuh, Number 118, Jossey-Bass, Summer, 2002

**“Institutional Financial Health: Tuition Discounting and Enrollment Management”** The Institute for Higher Education Policy, 2001

**“Financing Private Colleges and Universities: The Role of Tuition Discounting,”** with David W. Breneman, and James L. Doti in **The Finance of Higher Education**, edited by Michael Paulsen and John Smart, Agathon Press, New York, 2001

**“An Uncertain Future: Results of the 2000 NACUBO Tuition Discounting Study,”** with Loren Loomis Hubbell in the **NACUBO Business Officer**, February, 2001

- "Positioning for Competition: Results of the 1999 NACUBO Tuition Discounting Study,"** with Loren Loomis Hubbell in the NACUBO Business Officer, March, 2000
- "What You Need to Know About Enrollment Management"** in Roles and Responsibilities of Chief Financial Officers, edited by Lucie Lapovsky and Mary McKeown-Moak, New Directions in Higher Education, Number 107, Jossey-Bass, pp. 5-17, Fall, 1999
- "Private College Pricing: Are Current Policies Sustainable?"** with David Breneman and Daniel Myers in Futures Forum 1999: Exploring the Future of Higher Education, Yale University, June, 1999
- "An Enrollment Management Tool," NACUBO Business Officer"**, March, 1999
- "Response to the Federal Cost Commission Report,"** Crosstalk, Higher Education Policy Institute, California, April, 1998
- "Wisdom Needed,"** NACUBO Business Officer, February, 1998
- "Phantom Dollars,"** NACUBO Business Officer, March, 1997
- "Tuition Discounting Continues to Climb,"** NACUBO Business Officer, February, 1996
- "Uses and Sources of Financial Data for Institutional Management"** in New Directions for Institutional Research, Jossey-Bass, Patrick T. Terenzini and Charles S. Lenth, Editors, 1991
- "Maryland ACE/NIP,"** The MAHE Journal, Volume III, October 1990
- "State Aid to Independent College and Universities"** with L. Leslie Bennett, The MAHE Journal, Volume II, October 1988
- "State Support to Private Higher Education"** with Sandra Allard, Values in Conflict: Funding Priorities for Higher Education Mary McKeown and Kern Alexander, Editors, Ballinger, 1986
- "The Utility of HEGIS Data in Making Institutional Comparisons"** with Mary P. McKeown, Educational Considerations, IX, No. 1, Winter/Spring, pp. 16-18. , 1984
- "Student Aid in Maryland,"** News and Views, Vol. 13, No. 4, January/February, 1983.
- "Utility of HEGIS Finance Data: A State Board Perspective"**, Proceedings of Joint Study Group on the Utility of HEGIS Finance Data, NACUBO, ACE and NCES, May 1980
- "Financial Health Indicators in the State of Maryland"** with Frank Schmidlein, Business Officer, March 1980
- "Use of Financial Health Indicators in Maryland,"** Proceedings of Financial Measure Conference, American Council on Education, 1980

#### **Selected Invited Addresses:**

- "Changing Landscapes, Fiscal Implications and Emerging Models: The Current State and Future Trajectory of Higher Education"** Invited address – 3<sup>rd</sup> Annual Martin A. Hehir, C. S. SP. Memorial Lecture at Duquesne University, March 16, 2021
- "Impact of Covid-19 on Enrollment, Tuition and Finances"** Southern Association of College and University Business Officers, Fall Workshop, November 2, 2020
- "Cutting Edge Changes at the Postsecondary Level"** Sarasota Institute Symposium, Educating for the Year 2035, Sarasota, FL January 18, 2020
- "Tuition Pricing Considerations: Is a Reset Right for Your Institution?"** Panel discussion at Council of Independent Colleges President's Leadership Institute, Marco Island, FL January 6, 2020
- "Take a New Look at Spending Policies"** CommonFund Forum, Orlando, FL March 26, 2019
- "Presidential Leadership and Innovative Strategies for Fiscal Stability and Growth"** Panel discussion at Council of Independent Colleges President's Leadership Institute, Scottsdale, Arizona Jan. 5, 2019
- "Lessons from the Field: A Consultant on Strategy, Financial Sustainability & Board Effectiveness Tells All"** WASC, President and Board Workshop, December 6 and 7, 2018
- "How do we Lead Towards Financial Sustainability In the Face of the Current Narrative"** Panel discussion, Liberal Arts College Conference, Minneapolis, July 2018
- "Funding Structures to Support Success"** Start to Finish Conference in Denver, March 6, 2018

**"New Financial Models for our Times"** plenary panel and workshop, Association of Catholic Colleges and Universities Annual Conference, Washington, DC, February, 2018

**"Effective Strategies for Addressing Financial Challenges"** with Carmen Twille Ambar, Council for Independent Colleges President's Institute, Hollywood, Florida, January 2018

**"Tuition Discounting: What Every CFO Should Know"** Southern Association of College and University Business Officers annual meeting, Asheville, NC, April 19, 2016

**"Women's Leadership Forum in Higher Education"** Academic Leadership Center, Ryad, Saudi Arabia, Selective leadership addresses Feb. 28 – March 3, 2016

**"Lessons from the World's Best Service Providers"** New England Board of Higher Education panel discussion, Boston, October 2015

**"Tuition Resets: What Have We Learned?"** Council of Independent Colleges President's Institute Roundtable, San Diego, January 2015

**"What should the board know to assure that their institution is operating efficiently and effectively?"** Idea Exchange, Association of Governing Board's Annual Meeting, San Francisco, April, 2013

**"Can Women Have It All"** panel discussion sponsored by the Women's Mentoring and Leadership Alliance, New York City March 20, 2013

**"Where to Spend Scarce Resources: The Case of Three Liberal Arts Colleges"** Council of Independent College's President's Institute, Palm Harbour, Florida January 5, 2013

**"Can We Keep Higher Education Affordable?"** Keynote address, Council of Independent College's Chief Academic Officer's Institute, San Antonio, Texas, November 6, 2012

**"What Presidents are Talking About,"** Women's Leadership Institutes in Florida and California sponsored by ACUI, November and December, 2011

**"Benchmarking Women's Leadership and a Collective Action Agenda,"** National Council for Research on Women Western Regional Conference in Pomona, CA October 14, 2011

**"Benchmarking Women's Leadership"** Montgomery, AL Chamber of Commerce Annual Diversity Summit, September, 2011

**"Women in the Board Room and in the President's Office: What Difference Does it Make?"** panel discussion at the Association of Governing Board's Annual Meeting in Los Angeles April 4, 2011

**"A President's Guide to Tuition Pricing and Discounting"** with Sandy Baum at the Council of Independent College's Annual President's Institute, Palm Desert, CA January, 2011

**"Making Sense of CFOs and CBOs: The 2010 National Profile"** with Ken Redd at the 2010 National Association of College and University Business Officers annual meeting in San Francisco, July 2010

**"Women's Forum: Benchmarking Women's Leadership"** at the National Association of College and University Business Officers annual meeting in San Francisco, July 2010

**"Tuition Discounting"** with Sandy Baum at the Student Financial Aid Research Conference in San Diego June, 2010

**"How to Save Resources: Creative Solutions to Cost Containment"** Keynote address to the California Association of Institutional Researchers, Pasadena, CA November, 13, 2008

**"Enrollment and Endowment Management"** with Sandy Baum presented 12 times throughout Japan, September 2008

**"Show Them the Money: The Influence of Financial Aid on Students' and Parents' College Choice and Perceptions"** Keynote session at Stamats Integrated Marketing Conference in Chicago, July 21, 2008

**"How to Think About Cost and Cost Containment"** webinar for Magna Pub. , May, 2008

**"Tuition Discounting is Everyone's Business"** with Reagan Ramsower, Tally Hart and Tom Taylor at the NACUBO annual meeting in New Orleans, July 30, 2007

**"Tuition Discounting: Not Just a Private Sector Practice Anymore"** with Sandy Baum at the NASFAA Annual Meeting in Washington, D.C. July, 2007

**"Tuition Discounting: Not Just a Private Sector Practice Anymore"** with Sandy Baum at the AGB Annual Meeting in Phoenix, AZ March, 2007

**"Are Need-Based Aid and Merit Aid Competing or Compatible Policy Goals?"** panel discussion at the ACE Annual Meeting in Washington, D.C. February, 2007

**"Tuition Discounting: Not Just a Private College Issue"** with Sandy Baum at the Steinhardt Institute at NYU, February, 2007

**"Cost Containment and Institutional Quality"** invited address to University of Pennsylvania alums from the Doctorate in Education Program, Philadelphia, PA January, 2007

**"Cost, Quality and Access in Higher Education"** luncheon plenary with Britt Kirwan at the Annual Conference of the Middle States Commission on Higher Education in Philadelphia, December, 2006

**"Cost Containment and Institutional Quality"** AGB meeting in Pittsburgh, October, 2006

**"Expensive Policies"** AGB meeting in Pittsburgh, October, 2006

**"New Answers to Old Questions About College Costs"** plenary panel at the AGB annual meeting in Orlando, April 3, 2006

**"A Conversation About College Costs"** hosted by AGB in Atlanta and Chicago, November 4 and 14, 2005

**"Setting Tuition in an Age of Discounting and Competition"** with Sanford Ungar and Anthony Caprio at the Association of Governing Boards Annual Meeting, San Diego, April 4, 2005

**"Enrollment Management and Tuition Discounting"** Independent Colleges of Indiana Trustees Conference, Indianapolis, March 7, 2005

**"Tuition Discounting and Enrollment Management"** Council of Independent College's of Virginia annual meeting of Admissions and Financial Aid Officers, May 21, 2004, Virginia Beach

**"A National Treasure: Education and Beyond "** panel at Brown Plus 50: A Renewed Agenda for Social Justice Colloquium at New York University, May 18, 2004

**"Improving Lives: Ensuring Academic Success for Low-income Adults"** American Council on Education 2004 Annual Meeting, March 1, 2004, Miami, Florida

**"The Importance of Student Retention from a Presidential Perspective"** USA Funds Conference, February 24, 2004, Scottsdale, Arizona

**"Council of Independent Colleges and Universities Seminar for Legislators"** New York, January 13, 2004

**"Strategic Planning under Fiscal Constraints"** American Council on Education, December 3, 2003, Washington DC

**"Common Budgeting Mistakes and How to Avoid Them: A Budgeting Process for Lean Times"** Stamats, November 19, 2003, Atlanta, Georgia

**"Fiscal Foundations and Economic Pressures"** American Council of Learned Societies, November 14, 2003, Williamstown, Massachusetts

**"Portfolio Construction: Strategies and Traps"** and **"Understanding Tuition Discounting"** Association of Governing Boards, November 10 and 11, 2003, Baltimore, Maryland

**"Tuition Discounting: A Total Approach"** with Loren Loomis Hubbell and Robert Massa, Academic Impressions Web Conference, September 25, 2003,

**"Tuition Discounting", "Working with Boards"** HERS Institute, July 14, 2003, Philadelphia, Pennsylvania

**"No Child Left Behind"** National Education Writers Association, April 25, 2003, Chicago, Illinois

**"A Fiscal Crisis in Colleges- What Happens Next?"** Education Writers Association talk with Journalists, February 22, 2003, Washington D.C.

**"Establishing Benchmarks for Effective Educational Practice"** Middle States Conference, December 16, 2002, Washington D.C.

**"The Board Finance Committee: What Should it Know and Ask"** with Will Reed, AGB Workshop, November 11 and 12, 2002, Arlington, Virginia

**"Small Institutions: Our Role in Financial Aid"** presentation at the NACUBO annual

meeting July, 2002, Vancouver, British Columbia

**"Is there a Glass Ceiling?"** keynote address to the Maryland ACE/Network annual spring conference, May 1, 2001, Baltimore, Maryland

**"What the Board Finance Committee Needs To Know"** with Will Reed, AGB workshop, November 13 and 14, 2000, Pittsburgh, Pennsylvania

**"Presidential Panel on Women in Higher Education"** New York ACE/Network State Conference, October 26, 2000, New York, NY

**"Tuition Discounting: Where is it Going?"** College Board Annual Meeting, October 30, 2000, New York, NY

**"Great Expectations: You and Higher Education in the 21<sup>st</sup> Century"** American Council of Education National Network of Women Leaders of Westchester Fall, 1999 Focus Group, New York, NY

**"Institutional Financial Health: Tuition Discounting and Enrollment Management"** National Center for Educational Statistics Meeting on College Costs, August, 2000, Washington D.C.

**"Enrollment Management and Tuition Discounting"** Hechinger Institute, June 3, 2000

**"Wisdom Needed - Tuition Discounting"** 1999 Annual Conference of the National Association of State Financial Aid Administrators, July, 1999, Las Vegas, Nevada

**"Institutional Student Aid, Tuition Pricing and Enrollment Management"**, National Association of College and University Business Officers, July, 1999 Annual Meeting San Antonio, Texas

**"Tuition Discounting: A Core Strategy for Pricing and Enrollment Management"** Association of Institutional Research Annual Forum, June, 1999, Seattle, Washington

**"Tuition Discounting: NACUBO Study Update"** 1999 New England Regional College Board Meeting, February 8, 1999, Boston Massachusetts

**"Tuition Discounting: Pricing and Enrollment Management Strategies"** Summit on Our Collective Future, Minnesota Independent College Foundation, November 6, 1998, Minnesota

**"Private College Pricing: Are Current Policies Sustainable"** with David Bronfman at the Forum for the Future of Higher Education, September 29, 1998, Aspen, Colorado

**"Educating a Board about Endowment Management"** at the Institutional Capitol Investing Forum, September 15, 1998, Washington, D. C.

**"Who Pays the Sticker Price? How to Get Your Class and Maximize Net Revenue"** at the National Association of State Financial Aid Administrators Annual Conference, July 17, 1998, Chicago, Illinois

**"Current Thoughts About Tuition Discounting, etc."** at the Annual Meeting of the Council of Independent College's of Virginia Finance Officers, Marymount University, June 4, 1998

**"The New Financial Responsibility Regulation"** with Jamiene Studley and Charles Masten at the National Association of Independent Colleges and Universities Annual Meeting, February 5, 1998, Washington, D.C.

**"Maintaining Momentum: Building Support Networks"** with Sara Coulter and Dan Jones at the "Women's Leadership: Changing Concepts of Power Conference" sponsored by the American Association of State Colleges and Universities, on November 15, 1997, Washington, D.C.

**"Oh, the Places We've Been; Oh, the Places We Will Go!"** with Barbara Fritze and Roberta Kaskel at the Eastern Association of College and University Business Officer's Fall Workshop at Georgetown University, November 13, 1997, , Washington, D.C.

**"Tuition Discounting and College Pricing"** at the Annual Board Retreat of CHELLA Financial, September 25, 1997 in Lake Tahoe, Nevada

**"What is the Price of College and Where is it Headed?"** with Art Hauptman at the National Association of College and University Business Officer's Annual Meeting, July, 1997, Boston Massachusetts

- "Remarks on the Occasion of the 20th Anniversary of ACE/N.I.P."** at the American Council on Education Annual Meeting, February, 1997
- "Tuition Pricing, Financial Aid and Discounting"** at the Eastern Association of Christian Business Officers Annual Meeting, 1997, St. Petersburg, Florida, February
- "Financial Issues for Future Leaders"** Pennsylvania American Council on Education National Identification Program Conference, November, 1996, Pennsylvania
- "The Future of Tuition Pricing, Financial Aid and Tuition Discounting"** at the Education Securities National Symposium "Reading the Tea Leaves", November, 1996, Washington, D.C.
- "Mentoring"** Panel at Maryland ACE/N.I.P. Spring Conference, June, 1996, Baltimore, Maryland
- "Tuition Discounting"** ACE Annual Meeting, February, 1996, San Diego, California
- "Tuition Discounting"** New England College Board Meeting, February, 1996, Boston, Massachusetts
- "Women Working Together: Where We Have Come From and Where We Are Going"**, ACE/NIP Winter Conference at Mills College, January, 1995, Northern California
- "Tuition Discounting"** at Eastern Association of College and University Business Officers Annual Conference, October, 1995
- "Strategies for Public and Private Institutions: Applying Financial Management to Facilities Planning During Periods with Static or Declining Resources"**, Association of Physical Plant Administrators Institute for Facilities Finance, November, 1994
- "Goucher College's Budget Model: A Tool for Communications and Decision-making"**, Eastern Association of College and University Business Officers, November, 1994
- "Goucher College's Budget Model: A Tool for Communications and Decision-making"**, Maryland Independent College and University Association, Presidential Retreat, November, 1993 and Finance Officers meeting, December 1993
- "Downsizing in Higher Education: the Resource Challenges for the Independent Institutions"**, Maryland Association for Higher Education, October, 1993
- "Caucus of Common Interest for Women Business Officers"**, National Association of College and University Business Officers Annual Meeting, July, 1993
- "Partnership Between Women Administrators in Higher Education and Women Legislators in Maryland"**, with Norma Long, National Association of Academic Affairs Administrators, Northeast Region, November 1992
- "Linking Planning and Budgeting: Ideal and Reality"**, Maryland Association for Institutional Research, November 1991
- "Is There A Glass Ceiling?"** Executive Women's Network, May 1991
- "Is There A Glass Ceiling?"** University of Maryland at Baltimore, October 1990, Baltimore, Maryland
- "Budget Issues in Higher Education"**, Baltimore Association of Women Deans, Administrators and Counselors (BAWDAC), September 1990, Baltimore, Maryland
- "A Model for Advancing Women in Higher Education"**, National Women Studies Conference, June 1989
- "Safely Using Halstead's Interstate Comparisons of Higher Education Financing: The State Perspective"**, Association of Institutional Researchers Conference, May 1989, Baltimore, Maryland
- "Financial Aid: What Should be Happening to Help Students Pay for College?"** State Higher Education Finance Officers, August 11, 1988
- "Issues of Risk to Providers and Consumers"**, Invitational Conference on College Prepayment and Savings Plans, July 1987. Sponsored by ACE, College Board, ECS, and National Center for Postsecondary Governance and Finance, Denver, Colorado

- "State Responsibilities for Access to Higher Education: Tuition Levels and Financial Aid Policies"**, Research on Student Financial Aid Issues '86, October 1986, Charleston, South Carolina
- "Inter-institutional Comparisons"**, State Higher Education Finance Officers National Conference, August 1985, Keystone, Colorado
- "Strategies for Budget Flexibility"**, Higher Education Financing Conference, November 1984, Tucson, Arizona
- "Strategies for Efficient Use of Facilities"**, State Higher Education Finance Officers National Conference, August 1984, Annapolis, Maryland
- "Boon or Morass - Using Higher Education General Information Survey to Support Research for the Dissertation"**, Eastern Education Research Conference, February 1983