



# Framing the future of higher education

Program

November 22, 2024

Fellows  
Symposium

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Dear Colleagues:

Welcome to the TIAA Institute's 2024 Higher Education Fellows Symposium, which we have titled "Framing the future of higher education." That's an apt description, as macroeconomic trends long in the making—followed more recently by the pandemic and now generative AI—have called into question what the coming years entail for colleges and universities.

Today we'll hear a range of perspectives on the evolution of higher education, and what that evolution means for administrators, faculty and students. We'll also look at how gains in longevity present new opportunities for colleges and universities, and ways institutions are supporting mental health, which has become a prominent concern on campus.

Symposiums like this one are central to the TIAA Institute's mission. We were founded to help the higher education community build and share critical knowledge. And to do that, we need the active engagement of scholars and leaders like you. So, thank you for joining us today and adding your voice to the discussion.

A handwritten signature in black ink that reads "Surya P. Kolluri".

**Surya P. Kolluri**

Head, TIAA Institute

# Fellows Symposium

## Framing the future of higher education

Date	Friday, November 22, 2024
Time	8:30 a.m. to 3:30 p.m. ET
Location	Convene 30 South 17th Street, Philadelphia, PA 19103 Pavilion Hub, 14th Floor Duane Morris Building Between Ludlow & Ranstead Street

### Agenda

8:30 a.m.	Registration, continental breakfast and networking
9:30 a.m.	<b>Opening remarks</b> <b>Surya P. Kolluri</b> , TIAA Institute
9:45 a.m.	<b>Macroeconomic trends in higher education</b> Moderator: <b>Timothy A. Rodgers</b> , TIAA  Speakers: <b>Richard Ekman</b> , Council of Independent Colleges, TIAA Institute Fellow <b>David P. Richardson</b> , TIAA Institute
11 a.m.	<b>What does AI mean for learners and higher ed leaders?</b>  Speakers: <b>Paul J. LeBlanc</b> , Matter and Space <b>Yves Salomon-Fernández</b> , Urban College

11:45 a.m.	<b>Lunch and networking</b>
12:30 p.m.	<b>Supporting mental health</b> Speakers: <b>Claire Borelli</b> , TIAA <b>Surya P. Kolluri</b> , TIAA Institute
1 p.m.	<b>The changing nature of higher education leadership</b> Speakers: <b>Ricardo Azziz</b> , Tellurian Global, LLC <b>Anne Ollen</b> , TIAA Institute
1:45 p.m.	<b>Break</b>
2 p.m.	<b>The changing nature of faculty workforce models</b> Speakers: <b>Anne Ollen</b> , TIAA Institute
2:40 p.m.	<b>The future of higher education in an era of longevity</b> Speakers: <b>James C. Appleby</b> , The Gerontological Society of America <b>Surya P. Kolluri</b> , TIAA Institute
3:20 p.m.	<b>Closing remarks</b>

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## **James C. Appleby**

### **The Gerontological Society of America**

James Appleby is the Chief Executive Officer of The Gerontological Society of America. Since joining the staff in 2008, he has focused GSA on advancing innovation in aging. GSA is the nation's largest interdisciplinary organization devoted to research, education, and practice in the aging field. The Society works to advance innovation in aging and disseminate information among scientists, clinicians, policy makers and the public. Appleby is leading the Reframing Aging Initiative to foster more accurate narratives of aging to replace the outdated "conventional wisdom" that dominates public understanding.



## **Ricardo Azziz**

**Tellurian Global, LLC**

Ricardo Azziz, MD, MPH, MBA is a scientist-educator-executive currently serving as Principal of Tellurian Global, LLC (d/b/a SPH Consulting Group), Executive Director of the Foundation for Research and Education Excellence (FREE Fdn.), Director of the Center for Higher Education Mergers & Acquisitions (CHEMA) at the Foundation, fellow of the Rockefeller Institute of Government, and on the faculties at the University at Albany-SUNY and the University of Alabama at Birmingham. Dr. Azziz had also served as President of Georgia Health Sciences University (previously the Medical College of Georgia). For the past three decades, Dr. Azziz has been a creative force in the fields of science, clinical medicine and art, and has served as transformational leader in the arenas of translational research, academic medicine, higher education, and healthcare. His work focuses on improving our global community through excellence in discovery, learning, creativity, and servant leadership.



## Claire Borelli

### TIAA

Claire is senior executive vice president and chief people officer at TIAA. She joined the company in 2022 as chief diversity and talent officer and has nearly three decades of experience as a human-resources leader at global financial-services companies. Before joining TIAA, she spent nearly 11 years at JPMorgan Chase, where she led HR roles for several divisions, including wealth management and the consumer bank. Prior to that she held senior roles at UBS Wealth Management and Merrill Lynch. Claire attended Temple University, is a certified Six Sigma Black Belt and has completed Columbia University's master's program in executive coaching. She is also very active in her community, having participated in numerous external nonprofit boards and leadership councils, including YWCA, St Joseph's University, Pierce College and Year Up Greater Philadelphia. She lives in Philadelphia with her husband John and their five children.





## Richard Ekman

### Council of Independent Colleges

Richard Ekman is President Emeritus and Senior Advisor of the Council of Independent Colleges and Lecturer in the Executive Doctorate in Higher Education Management Program of the University of Pennsylvania's Graduate School of Education. He is a Fellow of the TIAA Institute, and currently serves as Chair of the board of Project Pericles, Vice Chair of the board of the College-in-3 Exchange, Senior Advisor to The Registry for College and University Presidents, Of Counsel to Academic Search, and Senior Advisor to Academic Innovators. He also is a board member of Sage Scholars and Emeriti Retirement Health Solutions and serves on advisory boards to the Yale-New Haven Teachers Institute and the Gilder-Lehrman Institute of American History. Ekman is the past Chair of the Council of Harvard's Graduate School Alumni Association, Academic Search, American Academic Leadership Institute, Higher Education Research and Development Institute, and a past board member of numerous other organizations. He has taught at American University, Harvard University, University of Massachusetts-Boston, and Hiram College, where he also served as Vice President and Dean of the Faculty.

Ekman's two decades at CIC included significant growth and change in the organization and in the creation of numerous new programs and services. Earlier, he served as the Vice President of Atlantic Philanthropies, as the Secretary of the Andrew W. Mellon Foundation, and as Director, successively, of two divisions of the National Endowment for the Humanities—Education Programs and Research Programs, for both of which he led major reorganizations. His PhD, AM, and AB degrees (in history) were earned at Harvard University. He was one of the inaugural recipients of Harvard's W.E. B. Du Bois Medal, is a member of the Garfield Society of Ohio, and has been awarded honorary degrees and other recognitions by many colleges and universities.



## Surya P. Kolluri

### TIAA Institute

Surya Kolluri is Head of TIAA Institute and is recognized as a thought leader in retirement and healthy aging research. The TIAA Institute is a think-tank within TIAA that conducts cutting-edge research in the areas of financial and longevity literacy, lifetime income, retirement plan design and behavioral finance for higher education and the broader nonprofit sector.

Surya sits on the board of the Wharton Pension Research Council, the advisory councils of Georgetown Center for Retirement Research, the Retirement Research Center of the Defined Contribution Institutional Investment Association (DCIIA), and the National Center to Reframe Aging (GSA). He also served on the board of the MA/NH Chapter of the U.S. Alzheimer's Association. In 2021, Surya received The President's Volunteer Service Award via AmeriCorps for his commitment to strengthen communities.

Surya often speaks at high-level forums and is frequently cited in the media. They include the United Nations Silver Economy Forum, 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 serves on the World Economic Forum Longevity Economy Initiative and has spoken on these topics at Harvard, MIT, Stanford, Brown, Yale and the University of Pennsylvania.

Surya joined 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 at Bain & Co.

Surya holds an MBA 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.



## Paul J. LeBlanc

### Matter and Space

Dr. Paul J. LeBlanc is the Board Chair for Matter and Space, a new AI and Education company he co-founded with noted researcher George Siemens. Until June 2024, he served as President of Southern New Hampshire University (SNHU). He remains at SNHU as a researcher, writer, and advisor. Under the 20 years of Paul's direction, SNHU has grown from 2800 students to over 250,000 and is the largest non-profit provider of online higher education in the country, and the first to have a full competency-based degree program untethered to the credit hour or classes approved by a regional accreditor and the US Department of Education.

Paul is considered one of America's most innovative educators. In 2012, the university was #12 on Fast Company magazine's "World's Fifty Most Innovative Companies" list and was the only university included. Forbes Magazine has listed him as one of its 15 "Classroom Revolutionaries" and Washington Monthly named him one of America's ten most innovative university presidents.

In 2018, Paul won the prestigious TIAA Institute Hesburgh Award for Leadership Excellence in Higher Education, joining some of the most respected university and college presidents in American higher education. He has also received the Ernest L. Boyer Award (NACU), the Distinguished Alumnus Award (AASCU), the Ray Schroeder Leadership Award (UPCEA), the Alumnus of the Year Award from his alma mater, Framingham State University. He was named 2022 Citizen of the Year in his home city of Manchester, NH.

He is a frequently requested speaker internationally and often quoted in the media. He is the author of *Students First: Equity, Access, and Opportunity in Higher Education* (2021), winner of the 2022 Phillip E. Frandson Award for Literature, and *Broken: How are Social Systems Are Failing Us and How We Can Fix Them* (2022).

He served as Senior Policy Advisor to Under Secretary Ted Mitchell at the US Department of Education, working on competency-based education, new accreditation pathways, and innovation. He also served on the National Advisory Committee on Institutional Quality and Integrity (NACIQI), the National Academies of Sciences, Engineering and Medicine's Board on Higher Education and Workforce, the AGB President's Council, the NEASC (now NECHE) Commission, and the Board of the American Council on Education, which he chaired, as well as various corporate boards and advisory committees.



## 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.

Anne’s 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.

Anne has a masters in elementary education and has obtained the Certified Employee Benefits Specialist (CEBS) designation.



## 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 MA and a PhD in economics from Boston College, and a BBA from the University of Georgia.



## Timothy A. Rodgers

### TIAA

Timothy Rodgers is a Market Leader within the Retirement Solutions division at TIAA, a Fortune 100 financial services organization and leading provider of asset management and retirement services for the academic, research, medical and cultural fields.

In this role, Tim has general management responsibility for running all aspects of the geographic territory encompassing Virginia, West Virginia, Washington DC, Maryland, and Delaware. This includes developing strategic business plans and leading integrated, cross-functional teams to execute successfully in support of client needs and business goals. As Market Leader, Tim has also fulfilled the supervisory function to help ensure the team meets regulatory and compliance requirements for delivering Advice. Tim serves our clients from the local Baltimore, MD TIAA office.

Tim began his financial services career in 1988 at The Vanguard Group and held various roles in the retail, asset management, and institutional divisions. He then joined the institutional division at Fidelity Investments in 2000 and held roles in retirement plan implementations, retirement plan sales, and relationship management. Tim has been at TIAA since 2011 and has been a Sr. Relationship Manager, Director of Relationship Management (MI, OH, IN), Territory General Manager (Northern VA, DC, MD), and Market Leader.

Tim holds a Bachelor of Science degree in Mass Communications from Norfolk State University. Tim also holds an MBA from Eastern University. As a FINRA registered representative and principal, he holds Series 6, 63, 26, 7, 24 and 66 registrations. Tim also holds the Accredited Investment Fiduciary designation (AIF) and is a 2005 Fellow of The Partnership Diversity Leadership Program, Boston MA.



## Yves Salomon-Fernández

### Urban College

Dr. Yves Salomon-Fernández is the president of Urban College of Boston (UCB). Before joining Urban College, Dr. Salomon-Fernández was Senior Vice President for Operations Planning at Southern New Hampshire University (SNHU). Prior to joining SNHU, Yves served as president of two-year colleges in Massachusetts and New Jersey.

In 2024, the Boston Business Journal named Dr. Salomon-Fernández one of the city's Power 50 leaders, among others in the Boston area who are influencing their local communities for good. In 2021, the American Association of Colleges and Universities (AAC&U) and Cengage awarded her the Inclusion Scholarship for her efforts in reducing equity gaps and improving inclusion and belonging for minoritized students. In March 2018, *Diverse Issues in Higher Education* named Salomon-Fernández one of the Top 25 Women in Higher Education.

Yves currently serves on the Steering Committee of the Federal Reserve Bank of Boston's Inclusive Economies. She is a current member of the Board of Directors at the American Association of Colleges and Universities (AAC&U). Yves is the Immediate Past Board Chair of Mass Humanities and a current member of the Board of Double Edge Theater and Codman Academy. She periodically serves as a reviewer for Johns Hopkins University Press and the National Science Foundation.

Dr. Salomon-Fernández emigrated with her family from Haiti and grew up in Boston. She 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 PhD is from Boston College. In addition to English, Dr. Salomon-Fernández is fluent in Haitian Creole, French, and Spanish.



## Thought leadership on higher education

[How to recognize and respond to genuine trends with potentially significant impact on your institution](#)

Richard Ekman, Council of Independent Colleges, TIAA Institute Fellow

[Critical competencies for leading major institutional restructuring in higher education \(aka Big Scary Change\)](#)

Ricardo Azziz, Tellurian Global, LLC; Guilbert C. Hentschke, University of Southern California; Lloyd Jacobs, University of Toledo and University of Michigan; Richard Katzman, Foundation for Research and Education Excellence; Bonita Jacobs, University of North Georgia

[Connecting mental and financial wellbeing: Insights for employers](#)

TIAA Institute and High Lantern Group

[New workplace agreements create opportunities for a more diverse faculty](#)

KerryAnn O'Meara, Teachers College, Columbia University

[AI Could Actually Help Rebuild The Middle Class](#)

David Autor, Massachusetts Institute of Technology

[Intelligence Augmentation: Upskilling Humans to Complement AI](#)

Chris Dede, Ashley Etemadi, Tessa Forshaw, Next Level Lab, Harvard Graduate School of Education

[Broken: How Our Social Systems are Failing Us and How We Can Fix Them](#)

Paul J. LeBlanc, Matter and Space

For more thought leadership on higher education and financial security topics, please visit [tiaainstitute.org](https://tiaainstitute.org).





## About the TIAA Institute

Since 1998, 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).

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