



November 2

THURSDAY

10:00-11:30 a.m.

CHAPMAN CAMPUS TOUR

Join us for a 90-minute tour of Chapman University's Orange campus. Throughout this tour, you will get to see some of Chapman's most impressive buildings and features, highlighting the Musco Center for the Arts, Dodge College of Film and Media Arts, the Digital Media Arts Center, the Keck Center for Science & Engineering, the Sandi Simon Center for Dance, and more!

12:00-1:15 p.m.

LUNCH AND REGISTRATION

Whether you've just come in from the Chapman tour or just traveled to us from your home institution, enjoy a refreshing lunch with your WCCI colleagues before we kick off our fall 2023 conference.

1:15-1:30 p.m.

WELCOME AND LOGISTICS

Opening this year's conference, we are excited to hear from Chapman University's President, Daniele C. Struppa, who is pleased to welcome you to our campus!

1:30-2:45 p.m.

SESSION: GENERAL

Harold Hewitt, Executive Vice President & COO, Chapman University

Title: Campus Updates

Our meeting will begin with the traditional sharing of campus highlights from recent months.

2:45-3:15 p.m.

BREAK

3:15-4:30 p.m.

SESSION: CONCURRENT 1

Brian Thomason, Vice President for Finance & Controller, Chapman University

Spencer Endicott, Managing Director, KPMG

Title: Controllers' Breakout

This year's breakout session will be chaired by the host institution's own Vice President for Finance and Controller, Brian Thomason. Brian will lead a discussion of current topics in accounting based on suggestions from participants. KPMG will participate.

3:15-4:30 p.m.

SESSION: CONCURRENT 2

Lindsay Van Voorhis, Managing Director, Cambridge Associates

Olga Loy, Chair, Tax Practice, Winston & Strawn LLP

Katy Roig, Vice President for Finance & CFO, University of San Diego

Charles Cross, Vice President for Business & Finance, University of San Francisco

Title: Investments: Venture Capital/Private Equity & ESG

Following the example of very wealthy institutions, many schools are pushing to increase their allocation to Private Equity and Venture Capital. At the same time, Boards and faculty in some institutions are urging that their endowment show leadership in Environment, Social and Governance investing ("ESG"). The panel will discuss these trends from the perspective of member institutions, investment consulting, and legal issues related to complex limited partnerships.

4:30-5:00 p.m.

BREAK

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THURSDAY

5:00-6:00 p.m.

RECEPTION

After enjoying an afternoon of great content, join your fellow WCCI colleagues for a hosted reception with full bar before dinner.

6:00-9:00 p.m.

DINNER

We are delighted that Sodexo is hosting our dinner this evening. From incredible service to a delicious meal prepared by talented, area chefs, you're in for an outstanding presentation dining experience paired with dedicated time for connecting with your colleagues.

7:30-9:00 p.m.

SHUTTLES TO HOTEL

If you are staying at the Ayres hotel, we will have shuttle service on loop to the Ayres hotel that will run from 7:30-9:00 p.m.



November 3

FRIDAY

8:00 a.m.

SHUTTLE LEAVES FOR CHAPMAN

For those staying at the Ayres Hotel, shuttle service will depart from the hotel at 8:00 a.m. to Chapman University. If you are not staying additional nights, please be sure to check-out of your hotel room and bring your luggage with you. We will have room to store it at the conference.

8:15-9:00 a.m.

BREAKFAST

Before we kick off day two of the conference, a hearty breakfast will be provided.

9:00-9:20 a.m.

WCCI Business Meeting

9:20-10:30 a.m.

SESSION: GENERAL

Michael Osborn, Vice President, Senior Credit Officer, Moody's Investors Service

Title: *Ratio Analysis of WCCI*

WCCI will try something different this year. Moody's will collect our financial statements and analyze them using 10 key ratios that Moody's applies to their public credit rating process. Vice President Michael Osborn will then lead the group through a discussion of the relative performance of each indicator for the group in light of Moody's ongoing reports and analysis of the private sector in the U.S. higher education industry.

10:30-10:45 a.m.

BREAK

10:45 a.m.-Noon

SESSION: CONCURRENT 3

Jeffrey R. Cugno, Special Agent & Primary BAU Coordinator, Federal Bureau of Investigation

John Ojeisekhoba, Associate Vice President & Chief of Campus Safety, Biola University and Immediate Past President, IACLEA, The International Association of Campus Law Enforcement Administrators

Dr. Albert Vasquez, Ed.D., Vice President for Enterprise Risk and Safety, Chapman University

Nicolle Taylor, Vice President & Chief Business Officer, Pepperdine University

Title: *Active Shooter – Lessons Learned*

This panel brings together experts – including those who have experienced an active shooter on campus – to discuss what should be happening before, during, and after a critical incident. Attendees can expect to hear about strategies designed for the higher education community including preparation, training, awareness, and response techniques to keep an institution functioning during and after a critical incident. Additionally, attendees will leave with information about preparation, training, developing relationships with local authorities, available assistance from the Federal Bureau of Investigation, and business/mission continuity. An actual case study will also be reviewed and discussed.

10:45 a.m.-Noon

SESSION: CONCURRENT 4

Mike Groener, Former President, Holy Names University, Oakland

Title: *The Closure of Holy Names University, Oakland*

Colleges in the West with modest endowments and low enrollment have struggled through the pandemic, inflation and the onset of the demographic cliff. Several in California have closed or been acquired – Mills College, Marymount California University, and, in January of this year we learned that 154 year-old Holy Names University would close at the end of the Spring 2023 term. In this session Holy Names' last president Mike Groener will discuss the closure, focusing on the important lessons for higher education leadership in these challenging times.

12:00-1:30 p.m.

LUNCH

A healthy and delicious lunch will be provided along with one last opportunity to catch up and connect with your colleagues before the conference ends.

November 3

FRIDAY

1:30-3:00 p.m.

SESSION: CONCURRENT 5

[Kristy Paredes Collins](#), *Dean of Enrollment Management and Associate Provost, Pepperdine University*

[Julie McCulloh](#), *Vice Provost, Enrollment Management, Gonzaga University*

[Stephen Pultz](#), *Assistant Vice President for Enrollment, University of San Diego*

Title: *Enrollment Challenges*

A panel of Enrollment leaders will discuss strategies to address the demographic cliff, now about to hit the West; and strategies to address the national ban on race as a factor in admission plus other anticipated legislation and/or court rulings that will impact university admissions such as a national ban on race-based scholarships, revisions to the federal methodology that calculates Expected Family Contribution (SAI vs. EFC), and the growing public debate regarding the value proposition of higher education.

1:30-3:00 p.m.

SESSION: CONCURRENT 6

[Dr. Robert Lee](#), *Associate Professor of Accounting, Director of Center for Teaching and Learning Excellence, Pepperdine University Graziadio Business School*

[Ben Postlethwaite](#), *Professor for Organizational Behavior and Management, Pepperdine University Seaver College*

[Greg Ramirez](#), *Chief Financial Officer, Pepperdine University*

[Daniel Wu](#), *Head of AI and Machine Learning, Commercial Banking, J.P. Morgan Chase & Co.*

Title: *The Impact of Generative AI on Higher Education*

Three university leaders will explore the significant impact of generative AI on higher education. They will engage in a thoughtful dialogue on how colleges and universities can proactively embrace this technology and capitalize on its potential benefits. They will delve into the practical integration of AI-driven solutions to enhance teaching methodologies, streamline administrative tasks, and personalize learning experiences for students. However, the discussion will also address the potential risks associated with generative AI, including ethical concerns related to data privacy, algorithmic bias, and the potential displacement of certain job roles. By striking a careful balance between leveraging the transformative power of AI and safeguarding against its potential pitfalls, the leaders hope to chart a prudent path for higher education in the midst of technological advancements.

3:00 p.m.

**ADJOURN AND DEPART
FOR THE AIRPORT**