Pipeline to the Chief Business Officer — Challenges, Opportunities and Calls to Action

Tuesday, September 22 | 1:00-2:00 p.m. ET

Sponsored by

[Logos for cupa-hr and NACUBO]
Presenters

Andy Brantley
CEO, CUPA-HR

Susan Johnston
President and CEO, NACUBO

Sarah Nadel-Hawthorne
Survey Researcher, CUPA-HR
Agenda

- Introduction
- Review of Administrative Positions
- Focus on the Chief Business Officer (CBO)
  - Data Highlights
  - CBO, Leadership team, and Pipeline
  - Representation of Women
  - Representation of Minorities
- Calls to Action
- Open Discussion
2019 Administrators in Higher Education

Age and Years in Position

- Median Age When Incumbents Started in Position
- Median Age of Incumbents Now

Overall
- Median Age When Incumbents Started in Position: 46
- Median Age of Incumbents Now: 54

Top Executive Officers
- Median Age When Incumbents Started in Position: 54
- Median Age of Incumbents Now: 60

Senior Institutional Officers
- Median Age When Incumbents Started in Position: 47
- Median Age of Incumbents Now: 55

Institutional Administrators
- Median Age When Incumbents Started in Position: 44
- Median Age of Incumbents Now: 52

Academic Deans
- Median Age When Incumbents Started in Position: 51
- Median Age of Incumbents Now: 58

Associate/Assistant Deans
- Median Age When Incumbents Started in Position: 48
- Median Age of Incumbents Now: 56

Heads of Units
- Median Age When Incumbents Started in Position: 43
- Median Age of Incumbents Now: 51
**Age and Years in Position**

- **Median Age When Incumbents Started in Position**
- **Median Age of Incumbents Now**

- Overall: Median Age 38 (when started), Median Age 42 (now)
- Facilities: Median Age 40 (when started), Median Age 45 (now)
- Information Technology: Median Age 40 (when started), Median Age 45 (now)
- Safety Professionals & Supervisors*: Median Age 38 (when started), Median Age 42 (now)
- Academic Affairs: Median Age 38 (when started), Median Age 42 (now)
- Fiscal Affairs: Median Age 38 (when started), Median Age 44 (now), Median Age 48 (current)
- Other**: Median Age 38 (when started), Median Age 42 (now)
- Health Science & Environmental Sustainability: Median Age 38 (when started), Median Age 42 (now)
- Student Affairs: Median Age 34 (when started), Median Age 37 (now)
- Institutional Affairs: Median Age 41 (when started), Median Age 44 (now)
- External Affairs: Median Age 38 (when started), Median Age 41 (now)
- Research: Median Age 38 (when started), Median Age 41 (now)
- Athletic Affairs: Median Age 35 (when started), Median Age 38 (now)

---

* Safety professionals and supervisors of office/clerical, skilled craft, service/maintenance personnel

** Includes administrative professional associates, extension programs, and other education professionals
2019 ADMINISTRATORS IN HIGHER EDUCATION

Composition of Administrators by Race/Ethnicity and Sex

Men
(49% Overall)

Women
(51% Overall)

White — 41.7%

Black/African American — 3.3%

Hispanic/Latino — 1.7%

Asian — 1.5%

Other — 0.6%

One square represents 0.5% of individuals

42.6%

4.5%

2.0%

1.3%

0.1%
Representation and Pay Ratios of Women by Administrative Category

<table>
<thead>
<tr>
<th>Administrative Category</th>
<th>Percentage Women</th>
<th>Median Pay Ratio of Women to Men Controlling for Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>51%</td>
<td>$0.83</td>
</tr>
<tr>
<td>Top Executive Officers</td>
<td>31%</td>
<td>$0.90</td>
</tr>
<tr>
<td>Senior Institutional Officers</td>
<td>43%</td>
<td>$0.90</td>
</tr>
<tr>
<td>Institutional Administrators</td>
<td>60%</td>
<td>$0.87</td>
</tr>
<tr>
<td>Deans</td>
<td>45%</td>
<td>$0.80</td>
</tr>
<tr>
<td>Associate/Assistant Deans</td>
<td>55%</td>
<td>$0.89</td>
</tr>
<tr>
<td>Heads of Units</td>
<td>55%</td>
<td>$0.87</td>
</tr>
</tbody>
</table>
Representation and Pay Ratios of Racial/Ethnic Minorities by Administrative Category

<table>
<thead>
<tr>
<th>Administrative Category</th>
<th>Percentage Racial/Ethnic Minority</th>
<th>Median Pay Ratio of Racial/Ethnic Minorities to Whites Controlling for Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>16%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
<tr>
<td>Top Executive Officers</td>
<td>15%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
<tr>
<td>Senior Institutional Officers</td>
<td>13%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
<tr>
<td>Institutional Administrators</td>
<td>19%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
<tr>
<td>Deans</td>
<td>16%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
<tr>
<td>Associate/Assistant Deans</td>
<td>18%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
<tr>
<td>Heads of Units</td>
<td>15%</td>
<td>$0.80 $1.00 $1.20 $1.40</td>
</tr>
</tbody>
</table>

- Black/African American
- Hispanic/Latino
- Asian
- Other

White Pay
Observations Regarding Administrative Positions

Challenges and Opportunities for Women

Challenges and Opportunities for People of Color
2019 ADMINISTRATORS IN HIGHER EDUCATION SURVEY

Age Distribution in CBO and CBO Leadership Team¹ Positions

- **Chief Business Officer**: 56
- **Chief Information/ IT Officer**: 56
- **Chief Campus Security Administrator/ Police Chief**: 56
- **Chief Human Resources Officer**: 55
- **Chief Facilities Officer**: 55
- **Chief Auxiliary Services Officer**: 55
- **Chief Purchasing Officer**: 54
- **Chief Financial Officer**: 53
- **Chief Environmental Health and Safety Administrator**: 53
- **Chief Budget Officer**: 52
- **Chief Accounting Officer/ Controller**: 52

**Median Age**

**Incumbents**

- 547
- 647
- 572
- 690
- 586
- 193
- 327
- 299
- 211
- 297
- 574
2019 Administrators in Higher Education Survey

Age Distribution in CBO and CBO Pipeline Positions

- All Women
- All Men

<table>
<thead>
<tr>
<th>Position</th>
<th>Median Age</th>
<th>Incumbents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Business Officer</td>
<td>56</td>
<td>547</td>
</tr>
<tr>
<td>Chief Administration Officer</td>
<td>56</td>
<td>63</td>
</tr>
<tr>
<td>Chief Financial Officer</td>
<td>55</td>
<td>299</td>
</tr>
<tr>
<td>Chief Investment Officer</td>
<td>54</td>
<td>62</td>
</tr>
<tr>
<td>Chief Business Affairs Officer</td>
<td>53</td>
<td>753</td>
</tr>
<tr>
<td>Chief Accounting Officer/Controller</td>
<td>53</td>
<td>574</td>
</tr>
<tr>
<td>Chief Contracts/Grants Administrator</td>
<td>52</td>
<td>142</td>
</tr>
<tr>
<td>Bursar</td>
<td>52</td>
<td>379</td>
</tr>
<tr>
<td>Chief Budget Officer</td>
<td>51</td>
<td>297</td>
</tr>
<tr>
<td>Deputy Chief Financial Officer</td>
<td>50</td>
<td>155</td>
</tr>
<tr>
<td>Deputy Chief Budget Officer</td>
<td>50</td>
<td>103</td>
</tr>
</tbody>
</table>

30  40  50  60  70  80
# 2019 Administrators in Higher Education Survey

## Years in Position of CBO and CBO Pipeline Positions

<table>
<thead>
<tr>
<th>Position</th>
<th>Median Years in Position</th>
<th>Distribution</th>
<th>Incumbents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Business Officer</td>
<td>5</td>
<td>581</td>
<td></td>
</tr>
<tr>
<td>Chief Investment Officer</td>
<td>8</td>
<td></td>
<td>64</td>
</tr>
<tr>
<td>Bursar</td>
<td>8</td>
<td></td>
<td>386</td>
</tr>
<tr>
<td>Chief Contracts and Grants Administrator</td>
<td>7</td>
<td></td>
<td>136</td>
</tr>
<tr>
<td>Chief Business Affairs Officer</td>
<td>6</td>
<td></td>
<td>688</td>
</tr>
<tr>
<td>Chief Budget Officer</td>
<td>6</td>
<td></td>
<td>309</td>
</tr>
<tr>
<td>Chief Administration Officer</td>
<td>6</td>
<td></td>
<td>64</td>
</tr>
<tr>
<td>Deputy Chief Financial Officer</td>
<td>5</td>
<td></td>
<td>162</td>
</tr>
<tr>
<td>Deputy Chief Budget Officer</td>
<td>5</td>
<td></td>
<td>106</td>
</tr>
<tr>
<td>Chief Financial Officer</td>
<td>5</td>
<td></td>
<td>313</td>
</tr>
<tr>
<td>Chief Accounting Officer/Controller</td>
<td>5</td>
<td></td>
<td>601</td>
</tr>
</tbody>
</table>
CBO leadership team "Other Positions" include: Chief Financial Officer, Chief Administration Officer, Chief Auxiliary Services Officer, Chief Purchasing Officer, Chief Environmental Health & Safety Administrator, Chief Campus Risk Management & Insurance Administrator, Chief Campus Parking/Transportation Administrator, Chief Campus Food/Dining Services Administrator, Chief Campus Real Estate Administrator

**Representation of Women on the Chief Business Officer (CBO) Leadership Team**

- **Chief Business Officer**: 34% Women, 77% Men
- **Chief Human Resources Officer**: 38% Women, 62% Men
- **Other Positions**: 34% Women, 77% Men

**CBO Leadership Team Positions with Highest Percentage of Women**
- Chief Human Resources Officer: 77% Women
- Chief Accounting Officer/Controller: 68% Women
- Chief Campus Bookstore Administrator: 66% Women
- Chief Budget Officer: 62% Women
- Chief Risk Management/Compliance Officer: 52% Women

**CBO Leadership Team Positions with Lowest Percentage of Women**
- Chief Investment Officer: 27% Women
- Chief Architect for the Institution: 23% Women
- Chief Information/IT Officer: 21% Women
- Chief Facilities Officer: 10% Women
- Chief Campus Security/Police Chief: 10% Women
2019 ADMINISTRATORS IN HIGHER EDUCATION SURVEY

Representation of Women on the Chief Business Officer (CBO) Pipeline Positions

<table>
<thead>
<tr>
<th>Position</th>
<th>White Women</th>
<th>Minority Women</th>
<th>Men</th>
<th>Average representation of women excluding CBOs (62%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Business Officer</td>
<td>34%</td>
<td></td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Pipeline Positions</td>
<td>0%</td>
<td>50%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

CBO Pipeline Positions with Highest Percentage of Women

- Chief Cost Accounting Administrator: 78%
- Chief Contracts and Grants Administrator: 100%
- Bursar: 76%
- Chief Business Affairs Officer: 69%
- Chief Accounting Officer/Controller: 68%

CBO Pipeline Positions with Lowest Percentage of Women

- Chief Budget Officer: 62%
- Treasurer: 51%
- Chief Administration Officer: 46%
- Chief Financial Officer: 44%
- Chief Investment Officer: 27%
CBO leadership team "Other Positions" include: Chief Financial Officer, Chief Information/IT Officer, Chief Accounting Officer/Controller, Chief Administration Officer, Chief Budget Officer, Chief Campus Risk Management & Insurance Administrators, Chief Campus Food/Dining Services Administrator, Chief Campus Real Estate Administrator, Chief Risk Management/Compliance Officer.
2019 Administrators in Higher Education Survey

Representation of Minorities in Chief Business Officer (CBO) Pipeline Positions

- Minority (non-White)
- White

Average minority representation excluding CBOs (14%)

Chief Business Officer: 8%
Pipeline Positions: 14%

CBO Pipeline Positions with Highest Percentage of Minority Representation
- Chief Contracts and Grants Administrator: 20%
- Chief Business Affairs Officer, College/Division: 18%
- Bursar: 16%
- Deputy Chief Budget Officer: 16%
- Chief Cost Accounting Administrator: 15%

CBO Pipeline Positions with Lowest Percentage of Minority Representation
- Chief Accounting Officer/Controller: 12%
- Chief Administration Officer: 11%
- Treasurer: 11%
- Chief Financial Officer: 10%
- Chief Investment Officer: 7%

CBO pipeline positions include: Chief Financial Officer, Chief Investment Officer, Chief Accounting Officer/Controller, Chief Administration Officer, Chief Budget Officer, Chief Contracts & Grants Administrator, Chief Cost Accounting Administrator, Deputy Chief Financial Officer, Deputy Chief Budget Officer, Bursar, Treasurer, Chief Business Affairs Officer, College/Division
Succession Planning in the Business Office

Most Frequently Cited Reasons for Not Having a Succession Plan (2016)

- Not a priority/urgent/important to institution/president: 13.2%
- No time/too busy: 7.3%
- Competing funding/time priorities: 4.8%
- "Weak bench"/talent development required: 4.8%
- Haven't focused on it or gotten around to it yet: 4.1%
- In process/just starting: 4.1%
- Don't know/unsure: 3.8%
- Other: 3.8%
- Institution too small: 3.5%
- New in CBO position: 3.5%

(Note: Respondents could select multiple responses.)
NACUBO Survey Results

150 Members Participated in NACUBO’s Poll on CBO Succession
Number of survey participants by institution type

- 2-Year Public Institutions: 21
- 4-Year Public Institutions: 39
- 4-Year Private Non-Profit Institutions: 85
- Other/Unknown: 5

Source: NACUBO poll of member Chief Business Officers, conducted September 9-14, 2020.
Many CBOs Believe There is at Least One High-Quality Succession Candidate at Their Current Institution

Percent of responding CBOs indicating whether there is at least one member at their current institution who would be a great candidate to succeed them when they leave or retire.

- No, there are no candidates: 41%
- Yes, there is one candidate: 36%
- Yes, there are two or more candidates: 23%

Source: NACUBO poll of member Chief Business Officers, conducted September 9-14, 2020.
Most CBOs Indicate That at Least One Woman is Among the High-Quality Internal Succession Candidates at Their Institutions

Share of responding CBOs who indicated that there is at least one member at their current institution who would be a great candidate to succeed them when they leave or retire

- 4-Year Private, Non-Profit Institutions: 67% Yes, at least one high-quality internal succession candidate is a woman; 33% No, no high-quality internal succession candidates are women
- 4-Year Public Institutions: 76% Yes, at least one high-quality internal succession candidate is a woman; 24% No, no high-quality internal succession candidates are women
- 2-Year Public Institutions: 88% Yes, at least one high-quality internal succession candidate is a woman; 13% No, no high-quality internal succession candidates are women
- All Institutions: 73% Yes, at least one high-quality internal succession candidate is a woman; 27% No, no high-quality internal succession candidates are women

Source: NACUBO poll of member Chief Business Officers, conducted September 9-14, 2020.
CBOs Indicate That Few People of Color Are Among the High-Quality Internal Succession Candidates at Their Institution

Share of responding CBOs who indicated that there is at least one member at their current institution who would be a great candidate to succeed them when they leave or retire.

- **Four-Year Private, Non-Profit Institutions**
  - 45 schools
  - Yes: 13%
  - No: 87%

- **Four-Year Public Institutions**
  - 25 schools
  - Yes: 36%
  - No: 64%

- **Two-Year Public Institutions**
  - 16 schools
  - Yes: 6%
  - No: 94%

*Source: NACUBO poll of member Chief Business Officers, conducted September 9-14, 2020.*
Succession Plan Elements Important to CBOs

- Talent development/professional development/training: 34.3%
- Appropriate technical skills/knowledge/qualifications for role: 14.9%
- Identification of potential successor(s)/talent: 13.6%
- Having staff in pipeline ready to take over/bench strength: 12.0%
- Business continuity/ability for current staff to close gaps: 12.0%
- Mentoring of potential successor(s)/talent: 9.4%
- Transition preparation/smooth transition/stability/"seamless": 5.8%
- Leadership development/skills training: 5.5%
- Transfer of institutional knowledge/history/culture: 4.9%
- Other: 7.7%

Observations and Calls to Action

Challenges and Opportunities for Women

Challenges and Opportunities for People of Color

Submit questions and comments to our presenters using the chat function
Overall Conclusions and Next Steps

Resources:
CUPA-HR Research Briefs (free resources)
CUPA-HR Data and Workforce Planning Data Reports
DEI Maturity Index (free resource)
Thank You!