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Ohio University: Hopes & Expectations for the next President

October 20, 2022

Presented By: The Collective Genius

Respectfully Submitted to the Ohio University Board of Trustees

The Ohio University Board of Trustees and University President Hugh Sherman came together in mid-2022 with the goal of engaging University stakeholders to tap into their hopes and expectations for the next University President.

They collectively decided that an independent, objective firm skilled in facilitating and moderating conversations that count would be the ideal conduit for this effort. They subsequently retained The Collective Genius (TCG) to lead the project.

A project design was crafted that combined virtual and online focus groups, on-campus and regional (some virtual) World Cafes, and one-on-one interviews as appropriate. TCG also partnered with Dr. Katie Hartmann and Ohio University's Center for Consumer Research and Analysis to create and field an online survey and video survey.

Targeted stakeholder groups included faculty, staff, deans, administrators, students, graduate students, alumni, alumni advisory boards, regional deans and regional faculty and staff, along with community and thought leaders from throughout the region and state.

The project design specifically sought to invite to the table any and all stakeholders who wanted to share input and to provide multiple opportunities to do so. The invitation can be as important as actual participation.

Further, a variety of venues and opportunities helps assure that the process is as inclusive as possible and respectful of all participants' time.

TCG set four additional objectives for the outreach. They included:

- Ensuring that the Board and Search Committee hear the voices of those who care about the University and its next leader
- Creating safe spaces for constructive conversations
- Objectively and holistically recording and communicating stakeholder views
- Building trust and credibility to help successfully launch the University's next president

TCG uses a combination of processes and methods from Appreciative Inquiry, the Stanford Design School and the Art of Hosting to guide its work. All participants in conversations were assured that no individuals would be named in the final report, that there were no right or wrong answers and all opinions would be respected, that we were recording, through our own notes, actual audio recordings, online chat, and, of course, through polling analysis, their responses to the questions. Finally, all were assured that a final report would be publicly available once the Board of Trustees were briefed at their October 20, 2022 meeting.

Over the course of September and early October, 2022, TCG convened 23 conversations with more than 300 participants, many of whom shared not only their personal views but also the views of the larger group of constituents they represented.

In addition, 3,175 surveys were successfully completed. The largest group of survey respondents were alumni (45%). However, all respondent groups except Others and Community Leaders exceeded 400 plus participants. Therefore, this is a statistically valid sample with a 3-4% margin of error although it is important to remember that these were self-selected participants rather than randomly selected ones.

The survey and the hosted dialogues focused on three core questions:

- What are the opportunities and challenges the next President should be prepared to capitalize upon or overcome?
- What experiences, training or background would best prepare the next President for success?
- What personality traits or leadership skills characteristics would help ensure the next President succeeds and serves all campus communities well?

In addition, all stakeholders were invited to offer a seminal question that the Screening Committee or Board of Trustees should ask each candidate.

What follows are the outcomes of all of this engagement, using both structured survey question results, open-ended survey comments and numerous quotes or summaries from various focus groups, interviews and World Cafes.

It's critical to note that the views and opinions expressed by participants reflect their shared experiences and beliefs. Their conclusions have not been fact-checked, nor were they balanced against additional information that may or may not offset their validity. We share them in the spirit of fulfilling our commitment to holistically report all perspectives.

We were privileged to lead many conversations with people who are very passionate and highly engaged. Many expressed great appreciation for the opportunity to share. They did not always agree on the issues or answers, but they clearly revealed a common thread: People love and value Ohio University. They hope that its next leader will bring them together, rise above the past and current challenges, and collectively build on the many assets of the University to chart a bright, sustainable future for one of the Midwest's oldest and best public institutions of higher education.

Respectfully Submitted,

Melinda Swan, CEO
The Collective Genius

the **COLLECTIVE** genius

Opportunities and Challenges for Ohio University's Next Leader

Ohio University's next president arrives at a pivotal moment in the University's history. All public universities are caught in the whirlwinds of significant change.

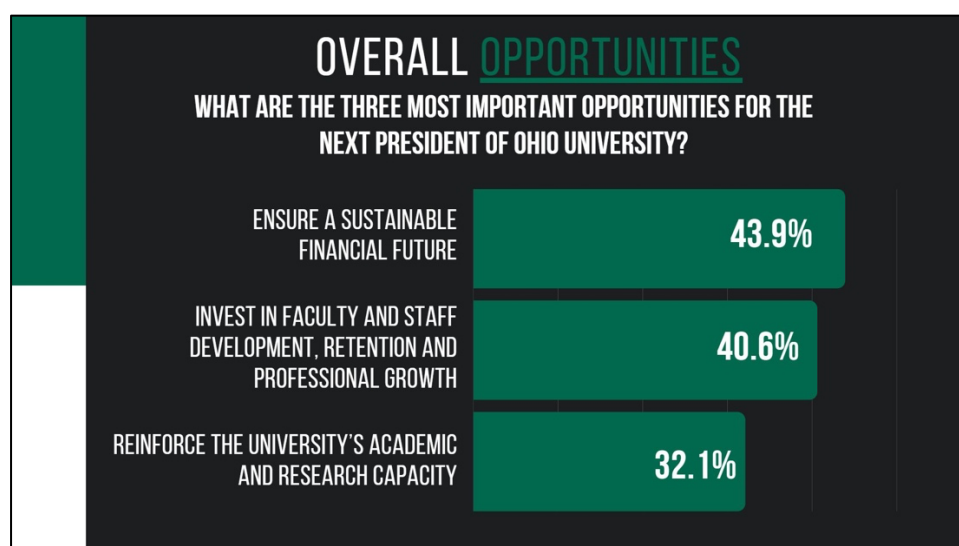
Life-altering trends include: the tsunami that was COVID-19 and its forced collective leap into online learning; the endless possibilities and challenges of online education; the beginnings of the expected demographic "cliff" where fewer "typical" undergraduates will be in the potential enrollment pool; the growing need for lifelong learning options; national and personal confrontations and introspection over long-standing racial inequities; heightened efforts to embrace and celebrate diversity; and intensified debates around sustainability, affordability, academic and research excellence, degree relevance, and heightened student expectations.

Ohio University is embracing and charting a course through this evolving landscape.

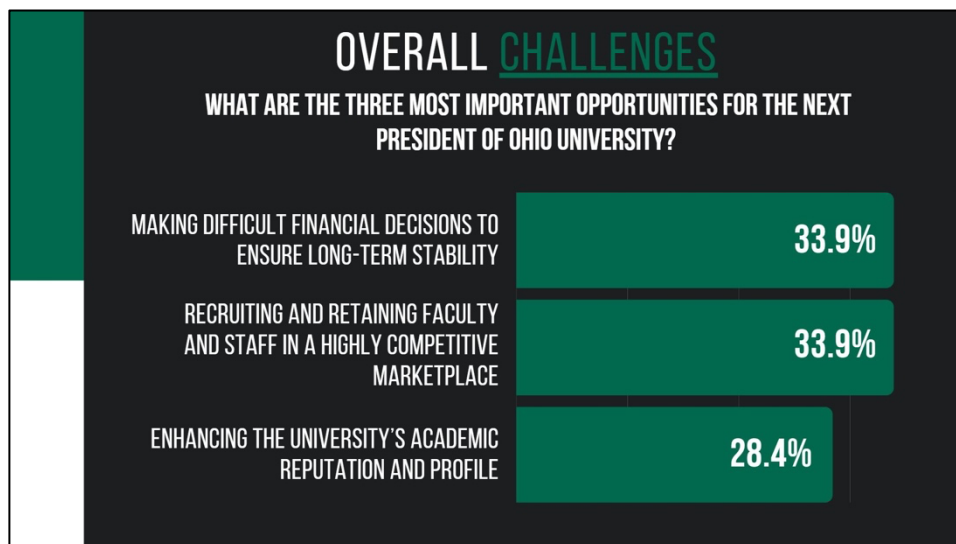
What type of leader is needed is often at least partially defined by circumstances. Thus, our opening questions in conversations and on the surveys sought to understand how stakeholders see "what lies ahead."

The survey instrument allowed participants to select/rank three of the most important opportunities from nine different options or provide an open-ended answer. It likewise afforded respondents the chance to pinpoint three key challenges from a list of 11 options and an open-ended answer.

Overall, key stakeholders who participated in the survey said that ensuring a sustainable financial future and investing in faculty, staff and professional development were the two most significant opportunities.



Correspondingly, they saw the two greatest challenges as making difficult financial decisions and recruiting and retaining high caliber talent.



Individual stakeholder groups had slightly different priorities:

- Alumni – Financial, Academic reputation
- Students – Financial, Student experience, Student outcomes/success, Meeting their needs in a post-COVID world
- Faculty – Investments in talent, Reinforcing the University's academic and research capacities, Recruiting the best and brightest, Improving culture and morale
- Staff – Investments in faculty and staff, Financial, Recruiting/retaining talent, Strengthening culture and morale

Our conversations add greater depth to these responses.

Staff and administrators referenced staff reductions in recent years as reasons for their insistence on investment in human capital. They seek additions in personnel to ensure that there is adequate teaching and support staff both to meet student needs and to bring workloads back into perceived balance. Some staff, along with some student leaders, even saw the record-setting freshman class size as a mixed blessing: they worry that the University lacks sufficient housing and food service arrangements for the new students.

- We have a very large incoming class, it's a golden goose egg. But if we drop the ball, it could turn into a loss. Retention is very important. *Student Leader*
- The majority of my cohort is working in housing, they've turned doubles into triples, singles into doubles. *Student leader*
- After layoffs, different modalities for connecting with students, now an increased student population... this has put a lot of stress on faculty. A no-nonsense approach from a new president... something that takes into account the weight on the faculty would be very welcomed and go a long way toward rebuilding trust and goodwill. *Faculty Senate member*

Both faculty and staff and some student representatives clearly believe the next President can and should do everything possible to boost morale, create a more positive culture and invest in new hires and existing personnel.

- Our faculty's knowledge, experience and loyalty to the University is bar none. But it's waning because of factors that have influenced morale... This process is a positive thing and a step toward building trust. *Faculty Senate member*
- Help rebuild a true sense of community by investing in the people who work here every day. *Union leader*
- I've heard a lot from the community... layoffs caused harm, turned families upside down. Rebuilding trust, extending kindness will be key to recruiting top-tier people. *External Partner*
- Lots of interim staff right now, which is an opportunity to find the right people who can make things happen. *Alumni Advisory Board member*
- Fabulous opportunity for new president to use the new money to invest... we can recruit nationally... if our salaries are in an appropriate range. *On-campus participant*

A key issue for some faculty was the University's research capacity and ability to both maintain its R1 status and grow its innovation infrastructure. This group strongly advised that research faculty should have significant input into the selection of the next President and that new leadership should prioritize securing resources, facilities and talent for the research endeavor.

- There's no STEM representation on the search committee... it's important that we are thinking of this, especially given the future of Ohio in this space. *Faculty Researcher*
- A background in STEM is critically important. We just made an R1 University so our next president must have knowledge of STEM research. *Student Senate member*

This concern was echoed, but from a slightly different perspective, by graduate students and those interested in international scholarship. This group of students and some faculty note that international students, especially graduate students, are key to the R1 status. They noted that the international administrator position has been vacant for some time and that numbers had declined. This conversation also tied into the larger issue of compensation and teaching expectations of graduate students.

- Who is spearheading international issues on campus? We celebrate international students but we don't do it continuously or strategically. *Student Leader*
- We've had an incredibly strong history of international partnerships. In the past six years, 44% of our Ph.Ds were international students, making them responsible for our R1 status if you look at this in a calculated way. *Dean*

Regional campuses, in particular, expressed concerns about the impact of financial reductions and a perceived loss of autonomy that they see as an impediment to their ability to respond to local community needs.

Deans, faculty and staff alike shared their hopes for future improvement, as did the regional and thought leaders we spoke to in small groups and one-on-one interviews. They advocate vigorously that the next President should build the Ohio University presence on all its campuses in a way that better reflects the differing needs of students, faculty and the communities in which those campuses live.

- Branch campuses are an opportunity to grow student enrollment both on their campuses and in Athens. Ohio and Hocking College and the recent \$1 million workforce grant are a great example... *Community Leader*
- A centralized model is not always best for regional campuses, it doesn't take local uniqueness into account. *Regional Staff/Faculty member*
- Do a better job of engaging the individual campus leadership and listening to them. *Regional Staff/Faculty member*

Alumni see Ohio University as a jewel for Southeastern Ohio and for affordable, high quality public education. They are highly sensitized to reductions in public funding, the national trend toward declining enrollment and the University's financial obligations. They clamor for a leader who can continue and enhance Ohio University's impact and reputation and make the tough financial decisions perceived as necessary for a sustainable future.

- There's going to be continuing enrollment challenges in the face of the demographic situation in Ohio and across the country. So much of the University's stability relies upon that. Also, pressure regarding the cost versus the value of higher education. We are in a good position because we were determined to be the best value in Ohio. *Alumni & Foundation Board member*
- We went through change and disruption during Covid-19. We now have the opportunity to recognize and value our faculty and staff... concerned about staff as a lot of people are being poached by other universities. *Advisory Board member*
- The next president has to be able to develop a value proposition: what we offer in relation to cost and what we are preparing students to do and earn... The next president will be charged with how we make education affordable. *Advisory Board member*

A minority of alumni voices used open-ended survey responses to express concern about the University's perceived intolerance of conservative or alternative viewpoints and perceived over attention to diversity, equity and inclusion. Their comments included:

- Be neutral on political issues and stop coddling activists on campus. *Survey respondent*
- Eliminate diversity and inclusion as an executive function. *Survey respondent*

It's important to note, however, that many alumni in conversations and elsewhere stressed the importance of proactive efforts to celebrate and enhance diversity and equity.

- Must understand the value of being proactive instead of reactive in creating a culturally sensitive climate. *Alumni Advisory Board Member*

Students, as one would expect, look to the University to provide great experiences that promote their overall well-being and educational attainment. They are concerned about residence halls in particular, both in terms of capacity and maintenance – an issue shared by Union leadership as well.

Students appreciate the University's actions to promote mental wellness and some welcome even greater access to behavioral health services. Many student leaders also believe that the University could and should do even more to embed a student-centered culture that embraces diversity and wellness.

- What would be the ideal college experience? What experience would we want during college and who could help create that? What is working well for us? *Student Leader*
- ...the belonging piece is missing. Sometimes people don't feel comfortable to be themselves because that hasn't been given to us. Advocate not just for DEI in numbers but to see it materialize in belonging. *Student Leader*
- ...mental health resources... brought in this lovely group of talented individuals but you need to pay attention to their mental health... students should know they're supported... student success is directly correlated to that. *Student Leader*

It bears repeating that, overall, all stakeholder groups care deeply for and admire and respect Ohio University. They seek a leader who wants to be a part of this special place and work—someone who shares their love of the University and its special place in Appalachian Ohio.

- No one is in Athens by coincidence. Everyone is there on purpose, which makes it a very unique environment... Everybody has to pull together to address every one of these issues, finances, diversity... has to be unconditional acceptance over a number of years so people can get well grounded. *Alumni/Foundation Board member*

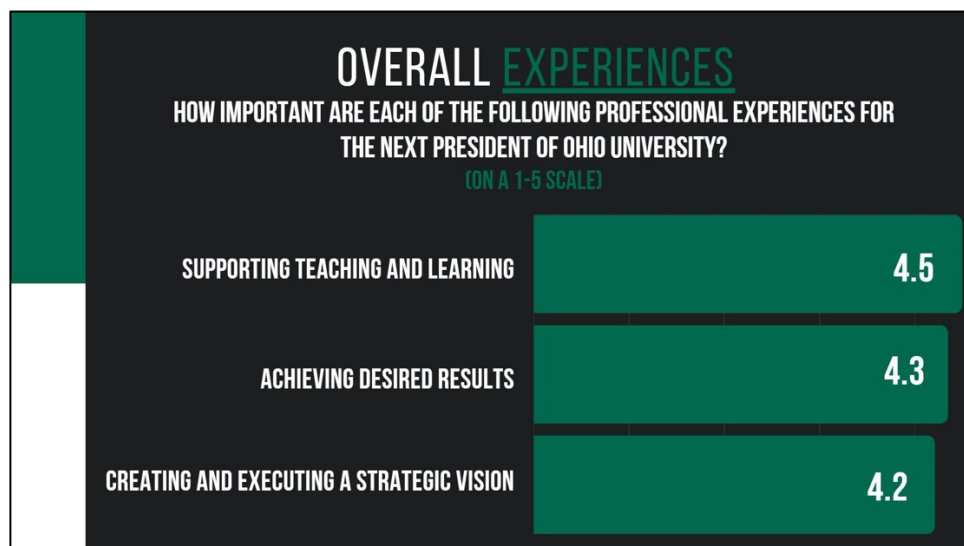
- There is a dynamic between the University and the different branches, there's an opportunity to redefine these relationships. *Community Leader*
- Healing is an opportunity, greater transparency is an opportunity. Create a budget model that encourages collaboration rather than competition. Experiential learning to not just get a a job, but also to gain personal growth, civic or community development, train our students to be good citizens—this is transformative for students and the University. *On-campus participant*

Other stakeholders offered these insights

- ...Management with a sense of heart and soul, similar to the James Madison model. He knew people would disagree but how do we get ahead, how do we have a civil conversation? That's the way we move forward. *Community Leader*
- This is a marvelous university, one of the first in the country, sitting in the poorest region of the state. It can be a powerful economic engine. *Community Leader*
- The next leader should have a good grasp of the economics of where our country is going, not about bricks and mortar per se, but aligning curriculum with the needs of students now and in the future. *Community Leader*

Experiences/Background/Education

Overall, stakeholders want a President highly experienced in supporting teaching and learning, adept at achieving desired results, and with the demonstrated ability to develop and earn support for a vision and strategy to achieve that vision.

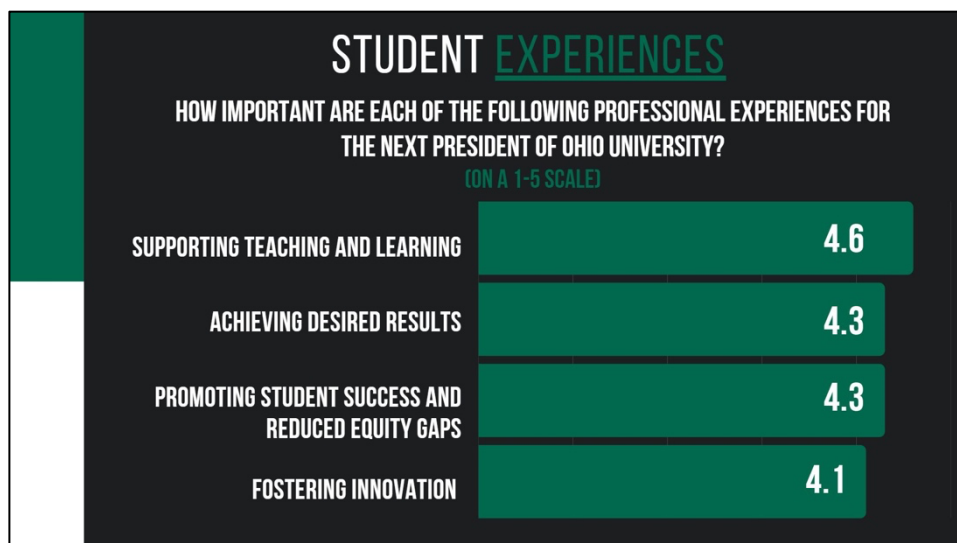


Alumni share the view of the overall group along with expertise in managing revenues and costs. Some also gave high ratings to attracting someone who had been a faculty member who garnered international acclaim for scholarship, in part because of alumni aspirations for the University's reputation.



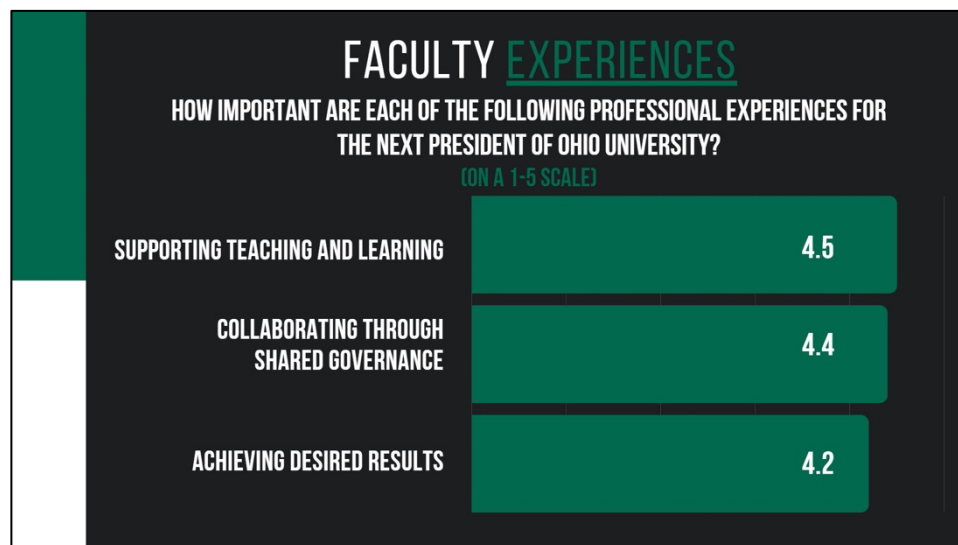
- Balance the major issues at hand. Bring in/retain faculty, grow enrollment, be proactive, especially on matters of race, find the things on the margins that separate Ohio University. *Alumni*
- A strategic doer... not just a vision but show me by your resume and by the reviews of your peers that you make it happen. *Advisory Board member*
- Our leader needs to be exceptional, with a demonstrated background and experience, someone who is out-front with communications and they're good at it. *Alumni & Foundation Board member*
- The future leader must be brave enough to lead Ohio University to the pinnacle of academic excellence. *Alumni*

Students concur with the overall consensus except that they value proven ability to cultivate innovation somewhat more than strategic vision.



- Leader and excellent manager, someone who has a proven track record of service at an institution that has grown, not just in enrollment but also in innovative programs... can make tough decisions, is known nationally or internationally, and can bring people together. *Student Leader*
- Not only good at research, but an entrepreneur so they can promote culture... also has ties to different institutes so that open up opportunities for students. *Student Leader*

Faculty prioritized finding an experienced leader who embraces shared governance to their list of top three valued experiences in lieu of strategic vision. They also voiced the importance of a proven track record in growing and stabilizing revenues and promoting student success.



- Understanding Ohio's unique strengths and building a strategy around them, not trying to be like everyone else. *Faculty*
- The President's primary role is to be the leader of the faculty. That means having faculty trust and we really need that. *Faculty Senate member*
- Studies have shown that, to be a good leader, you have to be a reputable scholar. *Research Faculty member*

One Dean noted offered this insight: "Someone with business experience but not too much or faculty won't take them seriously. They need to understand how an enterprise should function and function well... someone with some industry experience or who maybe spun off some entrepreneurial activity."

Staff concur with all the above and also place value on leading a public university and business/financial experience.



- Funding and budget balancing will be a big role for the new president. They should have new ideas about how to break away from state support and not just raise tuition. *Administrative Senate member.*
- Someone with a track record of unification across groups. *Administrative Senate*
- Creating a coordinated and efficient culture among faculty and staff. *Staff member*

Many emphasized that, because of the unique nature of leading a higher education enterprise, the best candidate would have an extensive history of accomplishments specifically in the public university environment.

Some did not feel that that this had to be gained through the “traditional” career path of faculty to chair to dean to provost. Others maintained that it absolutely should be the more traditional path because, without it, the leader would lack the knowledge of how to get things done and be collaborative.

- Someone comfortable making cuts to administrative bloat. Someone who has been... in a senior administrative position at another academic institution and has been very successful. *Faculty Senate*
- Research or teaching, ideally both. It’s really crucial given the R1 status. We are a distinct entity, don’t use Dell as the model to which we should be run. Understand that a University has different objectives, we’ve lost programs that didn’t appear to turn a profit, but they gave a worldview and nuance that students need. *Student Leader*
- Certainly something to be said for having experience in a place that operates by shared governance. But it doesn’t have to be a sitting president or provost. President Sherman’s success inside and outside the academy was a successful combination. *Community Leader*
- Connected to a state school, doesn’t have to be Ohio. They understand the political connections, the type of students, some background in business operations, some non-academic background. *Advisory Board member*

Research faculty specifically requested a president who had either been a researcher or who had successfully cultivated research enterprises in a higher education setting.

Similarly, those associated with regional campuses prize a leader who understands and appreciates the value of regional campuses and how to maximize their value to the students and communities they serve.

- Understanding Appalachian culture and the regional campus system, good understanding of finances and budget, experience with diverse cultures... listens to all, experience creating community relationships, working in economically disadvantaged areas... demonstrated that they have been able to lift morale or retain people. *Regional Campus member*

Many others outside of the regional campuses maintained that it would be a plus if the next leader understood rural communities and Southeast Ohio specifically.

Some of our conversation members and interviewees stressed the importance of finding an “up-and-coming” leader from a similarly sized public university. Many felt that it should be someone who truly wanted to serve Ohio University and not see this presidency as just another box to check on their career trajectory.

- I don’t want someone to use Ohio University as an opportunity for themselves, we need someone who wants to be a Bobcat, who will listen, learn and be thoughtful and then make decisions. They should be invested in us. *Student Leader*

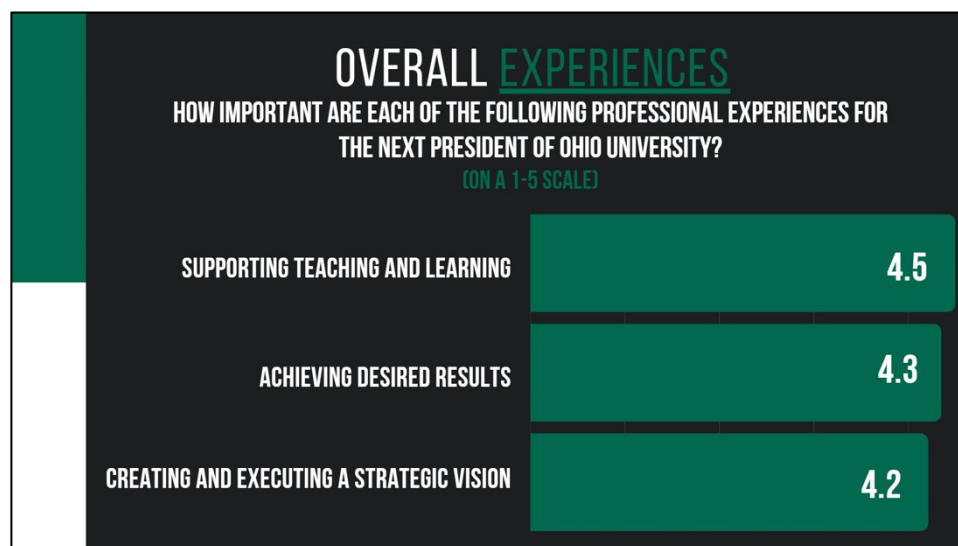
Finally, many also understood that the real test of leadership isn’t just personal expertise and an impressive background. It also encompasses the ability to build and develop a strong, collaborative senior leadership team.

Team-builder, servant leader, collaborator – these words arose frequently in all conversations.

- Someone who has the ability to assemble and lead a team, everything the president will do isn’t solely his or her job. *Student Leader*
- There are several key position searches, deans and VPs, ahead of the Presidential search at this point, so it will be important for the new president to work with leaders who are, themselves, new to their positions and, possibly, to OU. *Faculty member*
- There are innumerable, very talented people who could help the new president succeed... but he or she has to let competent people guide them. *Advisory Board member*
- Ability to build a team, show examples of building a team and someone who has managed through tough fiscal issues. *On-campus participant*

Personal Attributes/Leadership Style

The number one most prized characteristic of Ohio University's next leader is his or her ability to effectively communicate. This is true overall and among all of the stakeholder groups.



In this context, people were referring as much to communications substance as style. They describe a person who would help shape a shared vision for Ohio University, build consensus around the vision and then persuasively and enthusiastically share it with funders, policymakers, the campus community and its extensive network of alumni and supporters.

Words like charismatic, positive, sells the University genuinely, relatable to all audiences came up in nearly every conversation.

- Really have to be approachable and visible, go to football games, meet people... Win friends and influence people and not take it personally when people have complaints. *Union leader*
- Infectious enthusiasm... excited to learn, advocate... sincere, create a more welcoming campus climate. *Student Leader*
- Not only able to communicate with all levels... but also have to be able to say what needs to be said... be inspiring, there's a war on talent, let's inspire people to come to the University and work for us. *Advisory Board member*

A second key attribute was transparency. It ranked number two among all audiences and among the top three of each of the constituency groups.

What we heard about transparency is that it was connected to comparison of previous leadership. It is often the case that people make determinations about what type of leader they think will best serve an institution based, in part, upon perceived faults or shortcomings of prior leaders. Nearly all constituencies had very positive things to say about President Sherman's leadership. Some went so far as to say that the Board should simply find "another Hugh but 20 years younger and ready to stay longer."

That said, many stakeholders expressed concerns with some prior leaders, often focusing on Dr. Sherman's predecessor. It was in this context that certain themes arose, including transparency, willingness to make tough decisions and the ability to inspire or instill confidence.

Many said words like, "willing to do the hard things and be open and honest about why and how." Or as one student explained, "transparency - we're all going to mess up. Stand up and tell us why we did it, why it went wrong and what is being done to fix it."

In addition, the phrase "change agent" was often repeated. Sometimes it was applied in reference again to prior leadership. At other times, it was applied to systems that some still perceive as needing extensive re-examination and repair, such as campus morale, inclusivity, compensation, or facilities maintenance.

- Love the idea of someone who is willing to take risks, thoughtful, well-studied, calculated risks, but risks none the less. *Dean*
- Someone who is strategic... can't be everything to everyone. Able to make the strategic calls while maintaining a vision for the University. *Research Faculty member*

Many pointed out, though, that change should not happen because a president sought to put his or her personal imprimatur on Ohio University or just because he or she led that type of change elsewhere.

In other words, it isn't about change for change's sake.

- Change by building up rather than "fixing" things... I don't want a President with a playbook... someone who comes, learn, and helps establish a bold vision of how to advance. We experienced the prior and it didn't work. Change should be based on using our best assets more strategically than ever before. *Dean*

Other key words that flowed up from conversations was someone who was active, personable, accessible, someone who loved campus and wanted to be there. A servant leader who intentionally asked for input, listened to all opinions and then conscientiously communicated the final decision was also frequently mentioned.

- Enthusiasm, intellect, integrity... open-mindedness, digital savvy, solid ethics and a willingness to learn. *Regional campus participant*

- Courageous, strong, transparent. Someone who is not fully committed to the status quo and who can bridge the gap with academia. *Athens campus participant*
- More of a business model, more decisive. We would rather have a fast no than a soft drawn-out no. *Regional Dean*

Summary

As the Ohio University Board of Trustees and its appointed Search Committee launch the search process, they can be assured that they have the attention of all those who love the University.

The overwhelming numbers of people who took the time to attend a virtual or in-person sessions or respond to our surveys stands as a testament to the tremendous interest and importance of the presidential selection. And we know that many appreciated the invitation and expressed it in our groups.

The quantitative work undertaken as part of this process provides some consensus views about what matters most: financial management, academic and research excellence and improving student experience.

It also illuminates the desire to have a highly experienced leader who gets results and who has proven expertise in cultivating high quality teaching and learning opportunities.

Finally, he or she must be top-notch communicator, who is clear, accountable, open and accessible. They must intentionally excel and enjoy serving as an advocate, collaborator and visionary for Ohio University in the months and years ahead.

Our qualitative work adds depth and context to this portrait. It captures the reality that the new leader can select and foster a new leadership team that should respect and build upon Ohio University's strong existing assets while also helping find consensus on how to grow and evolve. It refines the phrase change agent to mean asset builder. It illuminates how the campus communities hunger to rediscover a sense of community in the aftermath of challenges.

Most importantly, we hope we have captured the spirit of a campus anxious to heal and move forward while deliberately and thoughtfully navigating the tides of change that are occurring throughout America's higher education system.

Ohio University's next leader has a tremendous opportunity.