



# New Presidents Intensive 2024

## **Shared Governance 2.0**

Building Trust and Campuswide Engagement Around Critical Decisions

July 2, 2024

# Update Your Name

Update your name and add your institution

The screenshot shows a Zoom meeting window. The main display area shows a presentation slide with the EAB logo and the text 'EAB Virtual Meetings 2020'. On the right side, there is a 'Participants' panel titled 'Participants (2)'. It lists 'Test Participant (Me)' and 'Meeting Host (Host)'. The 'Test Participant (Me)' entry has 'Mute' and 'Rename' buttons next to it. A yellow box highlights the 'Participants' icon in the bottom toolbar. A callout box points to the 'Rename' button in the participants list. Another callout box points to the 'Rename' dialog box that appears when the button is clicked. The dialog box has a title bar 'Rename', a close button 'X', and a text input field with the text 'Jane Doe - Institution'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

Zoom Meeting ID: 841-573-482 You are viewing Meeting Host's screen View Options

Speaker View

Participants (2)

Test Participant (Me) Mute Rename

Meeting Host (Host)

Rename

Enter a new screen name:  
Jane Doe - Institution

OK Cancel

Mute Stop Video Invite Participants Share Chat Record Leave Meeting

Open Participants menu

# New Presidents Intensive Curriculum



## VIRTUAL INTRODUCTION | 1:00 – 2:00 PM ET

**Tuesday, June 18, 2024**

## IN-PERSON SESSION | EAB HEADQUARTERS | WASHINGTON, DC

**Sunday, June 23, 2024**

6:00–8:00 pm ET

*Welcome Dinner*

**Monday, June 24, 2024**

9:00 am–7:00 pm ET

*2024 State of the Sector*

*Dynamic Strategy and Principled  
Differentiation*

**Tuesday, June 25, 2024**

9:00 am–1:00 pm ET

*AI, The Future of Work and Implications  
for Higher Ed  
What Every President Needs to Know  
about Athletics  
The President as Fundraiser-in-Chief*

## VIRTUAL SESSIONS | TUESDAYS | 1:00 – 3:00 PM ET

**July 2, 2024**

*Shared Governance 2.0*

**July 9, 2024**

*Understanding  
"Generation P"*

**July 16, 2024**

*Blueprint for Growth*

**July 23, 2024**

*Critical Considerations  
for Achieving Financial  
Sustainability and  
Resilience*

**July 30, 2024**

*The Balancing Act of  
Free Speech, Safe  
Spaces, and  
Deplatforming*

# Highlights from Our In-Person Session

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## Special Presidential Guests



**President Jonathan Alger**  
American University



**COO and EVP Chris Howard**  
Arizona State University  
(President-Emeritus – Robert Morris  
University,  
Hampden-Sydney University)



# Meet Your Presenter



**Colin Koproske**

*Managing Director, Research*

[CKoproske@eab.com](mailto:CKoproske@eab.com)

# Special Guest President

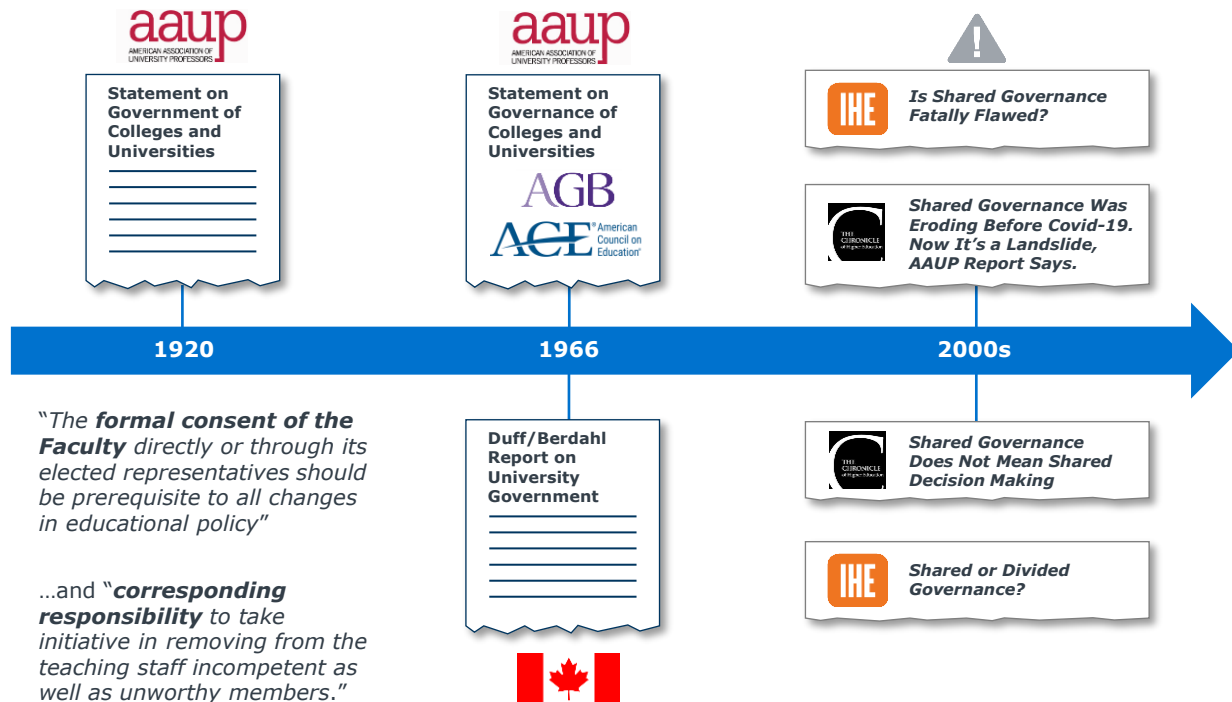


**Dr. Lisa Freeman**  
*Northern Illinois University*



# A 100+ Year History of Shared Governance

A Foundational Yet Perennially Fraught Concept in Higher Ed



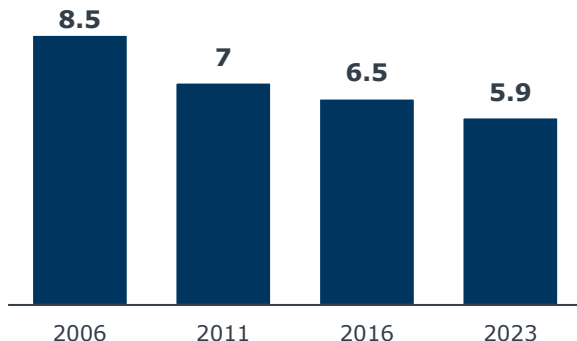
Sources: [AAUP](#), [Duff/Berdahl Report](#), Inside Higher Ed, "[Is Shared Governance Fatally Flawed?](#)" and "[Shared or Divided Governance?](#)"; Chronicle of Higher Education, "[Shared Governance Was Eroding Before Covid-19. Now It's a Landslide, AAUP Report Says.](#)" and "[Shared Governance Does Not Mean Shared Decision Making.](#)"

# The Elephant in the Room



## Executive Turnover – Both a Symptom and Cause of Governance Woes

### Presidents' Average Length of Service



*Is it financial pressure on the sector?*

- Most presidents feel their institution is more financially stable than in both 2019 and 2022
- CBO service length has remained steady at ~6.5 years

**And yet...**

**55%**

Of presidents plan to step down within the next five years

### What's Behind Increasing Turnover Rates?

Search firms and committees preferring **older candidates**

**Boards and policy-makers meddling** in institutional management

Media environment and culture **focused on finding (and amplifying) controversy**

The Pandemic Class – New leaders overwhelmed with crisis management with **no face-to-face "honeymoon"**



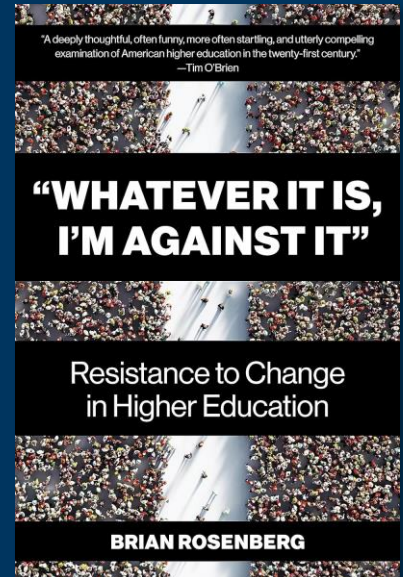
# The Innovator's Dilemma

“The operation of shared governance in higher education has from the start been criticized from virtually every angle, and the chorus of criticism has grown louder in recent years as many colleges and universities have faced unprecedented stress.

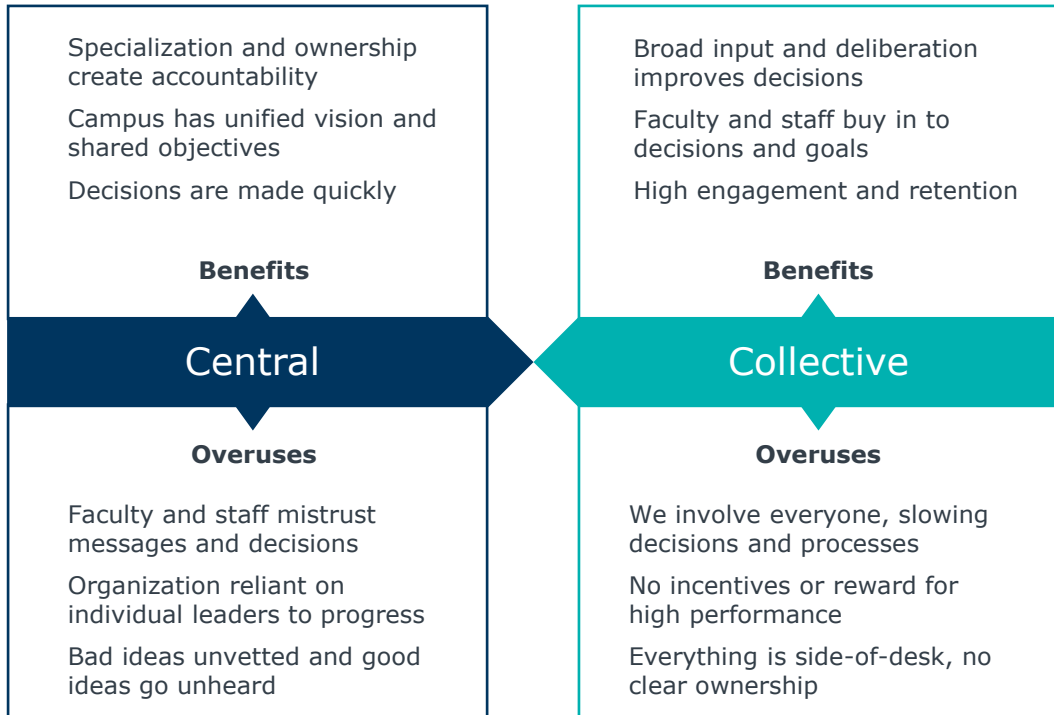
...The explicit or implicit goal of shared governance on a campus is something approaching consensus, and there are situations in which consensus is highly desirable ... **When the goal is transformational change, however, patient attempts to reach consensus are usually much less successful.**

...Perhaps it is an overstatement to say that **true innovation has never been the product of a committee**—but not by much.

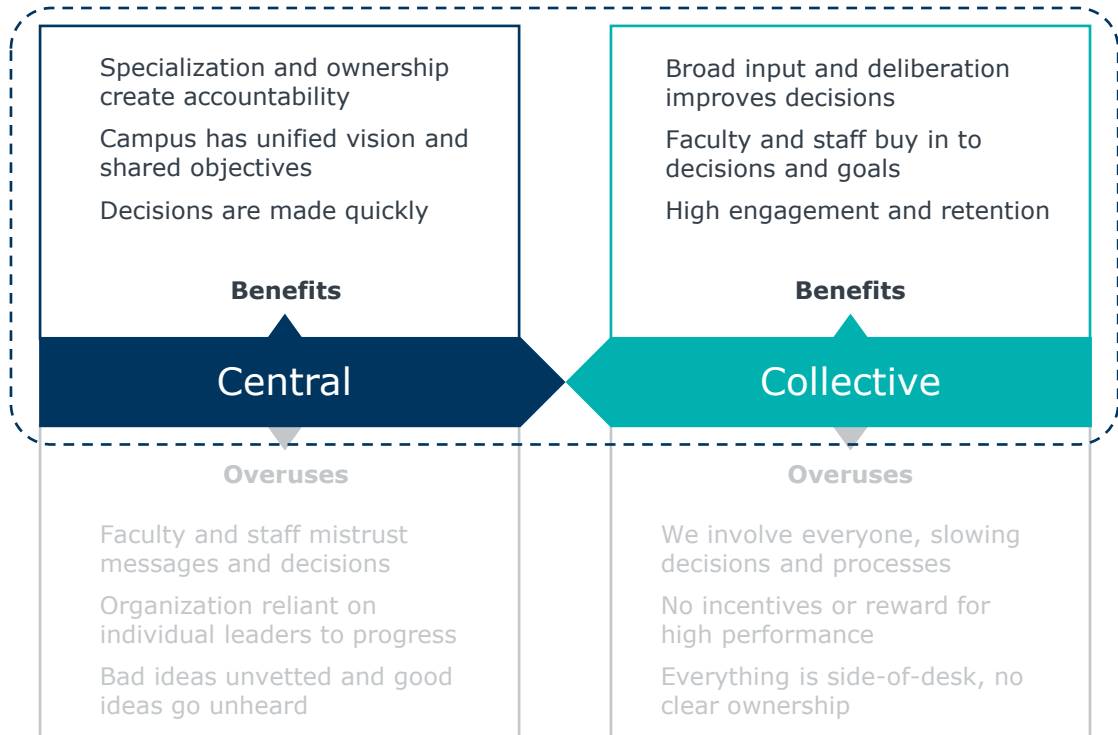
*Brian Rosenberg  
President Emeritus, Macalester College*



# Defining Effective Shared Governance



# Defining Effective Shared Governance



# A Realistic Path Toward Constructive Coalitions

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Activate the Persuadable and Interested on Campus

## Three Postures Toward Change on a Typical Campus



In a **Low-Trust** Environment, Critics Attract Allies and Potential Leaders Decommit



In a **High-Trust** Environment, Even the Uninvolved Support and Can Explain Changes



# Zoom Poll

## Trust Level on Your New Campus

What do you think best describes the level of trust between faculty and administration on the campus you'll be leading?

- Low Trust
- Medium/Mild Trust
- High Trust
- Too Early to Tell

# Driving Change in the Context of Shared Governance

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## Lessons in Balancing Agility, Clarity, and Consensus in Decision-making

### Authentic Leadership



- 1 Articulate a **clear strategic direction for the institution** that both inspires and constrains ambitions
- 2 Share (frequently) a **transparent, consistent, and digestible narrative** about institutional finances
- 3 Broach **difficult conversations in good times** (if available) to build a “reservoir of trust” and mutual understanding
- 4 **Encourage both formal and social interaction** between faculty, board members, administrators, and staff

### Structural Reform



- 5 **Agree on discrete decision rules and roles** for important, cross-functional institutional matters
- 6 **Foster an institutional mindset and elevate leadership potential** within academic units
- 7 Charge working groups and committees with **clear objectives, timelines, and contextual information**
- 8 Incubate innovation through **seed funding programs or a faculty-driven “think tank”**

### Board Engagement



- 9 **Ensure the board is proactively informed and engaged at a strategic altitude** on appropriate matters of concern, not distracted by minutiae or industry hype

# Driving Change in the Context of Shared Governance

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Lessons in Balancing Agility, Clarity, and Consensus in Decision-making

**Authentic Leadership**



**Structural Reform**



**Board Engagement**



## Additional Variables Impacting Decision-making



Collective Bargaining



Faculty Handbook / Bylaws



System Governance and Policy



Student Interest Groups



Institutional Mission



Faculty Status and Mix



Recent Leadership Precedent



Executive Turnover

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# Numbers Without a Narrative

20

## Why Typical Approaches to Expanding Financial Literacy Fall Short

### Standard Practices:



#### Annual Budget Presentation

CBO updates campus community on key indicators



#### Interactive Website

All financial reports and analysis available online



**Frequency:** "Oh, it's that time of the year again. Is that the CBO?"

**Digestibility:** "I still don't know what this means and I'm afraid to ask"



**Strategy:** "How does this relate to the strategic plan we just unveiled?"

**Relevance:** "How does this relate to my unit and my personal work?"



**Consistency:** "Wait, I got very different messages from my dean..."

# Building a Broader Business-Savvy Bench

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## Six Additional Practices to Avoid Discord Over Institutional Finances

### Standard Practices:



#### Annual Budget Presentation

CBO updates campus community on key indicators



#### Interactive Website

All financial reports and analysis available online

### Contextualize the Financial Narrative

#### Faculty Finance Deputy

Employ a trusted faculty expert to liaise and co-present with leadership

#### Budget Context Explainers

Create a short presidential letter and “SoU” update to explain financial context and impact on strategy

### Simulate Financial Decision-Making

#### Investment Workshops for New Hires

Faculty and staff asked to allocate a hypothetical gift

#### Budget Scenario Exercises for Department Chairs

Mini-MBA case studies teach new leaders to manage trade-offs and seek revenues

### Routinize Unit-Level Financial Analysis

#### Manage Units on Local Key Performance Metrics

SCH per FTE, instructional capacity, and course releases

#### Institute Regular Departmental Reviews

Each unit asked to tackle 1-3 challenges / opportunities each year by dean

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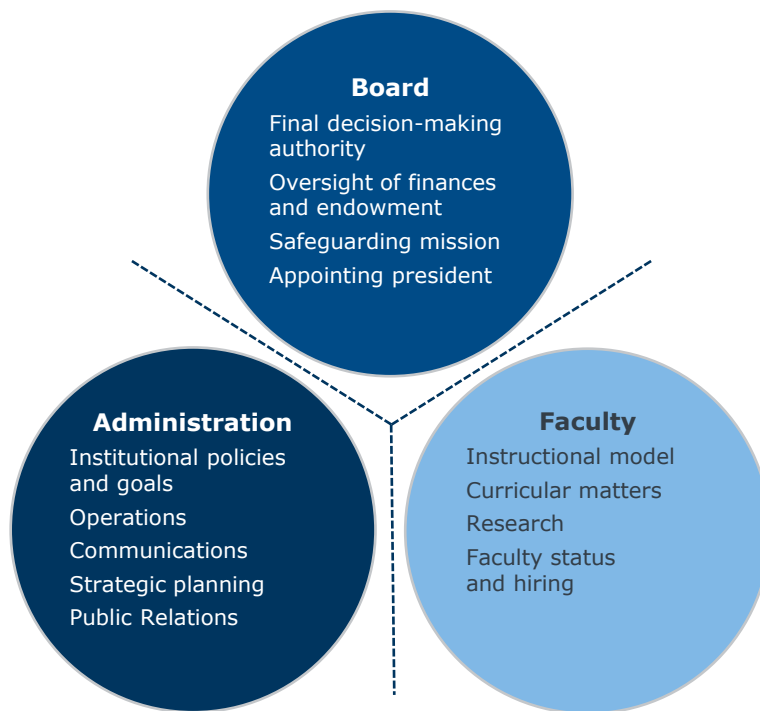
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# The Hypothetical: Separation of Powers

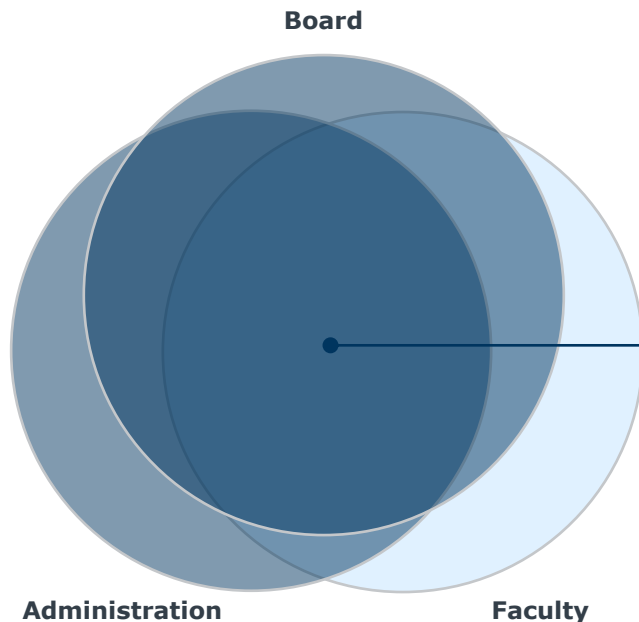
Formal “Swim Lanes” Delineate the Ultimate Domains of Each Group



# The Reality: Many Key Issues Live in 'Gray Areas'

29

As Higher Ed Evolves, Operational Complexity Increases



## Strategic Questions Requiring Cross-Constituency Collaboration

- Should we update our mission, vision, and values?
- What are our key institutional priorities and how should we measure success?
- What student populations should we serve?
- What facilities do we need?
- Where should the university stand on controversial issues?
- What talent do we need to meet our strategic goals?
- What is our ideal size?
- What student experiences and services are most important?

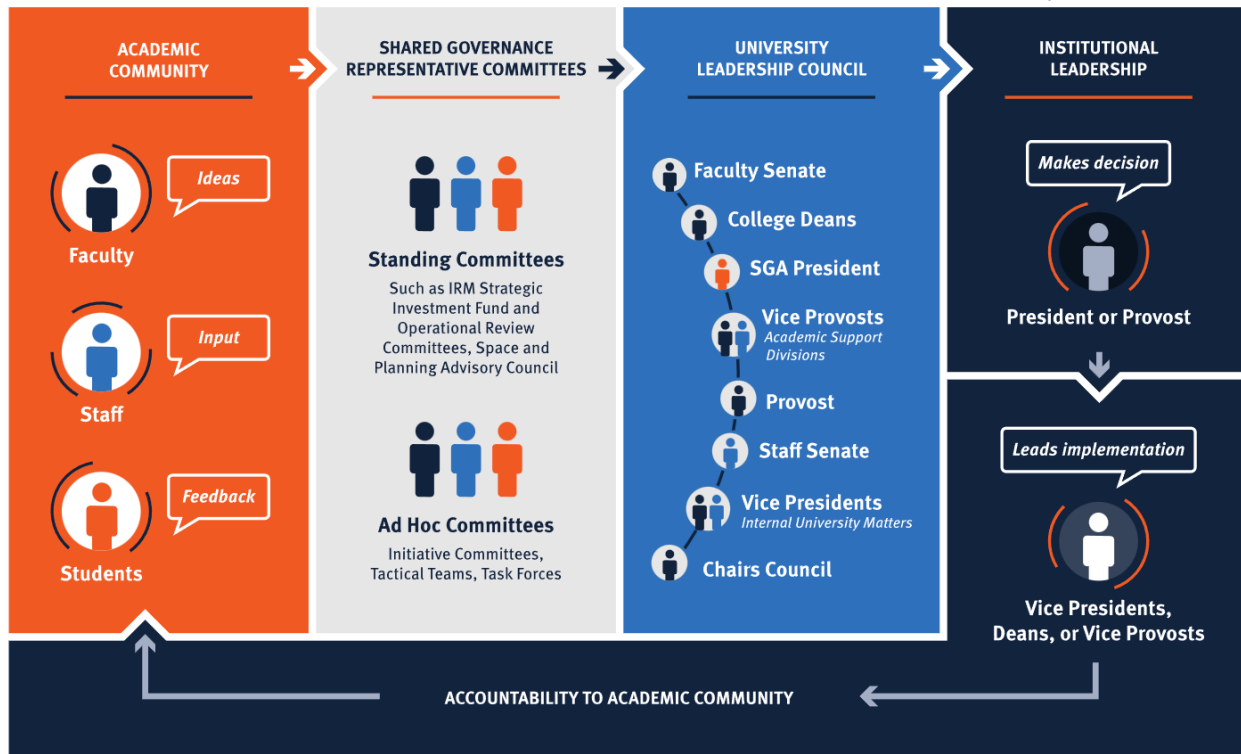
# Visualizing Shared Governance

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## Shared Governance for **University** Matters

**UTSA**

The University of Texas at San Antonio™



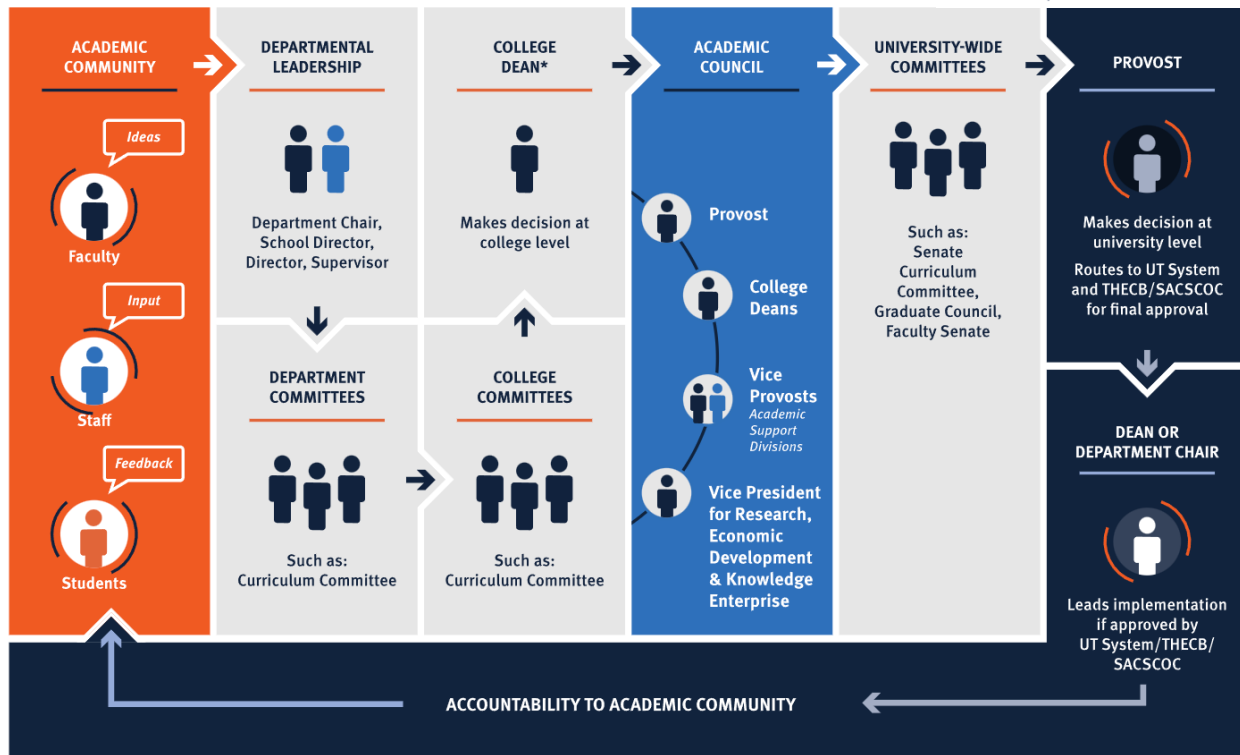
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31

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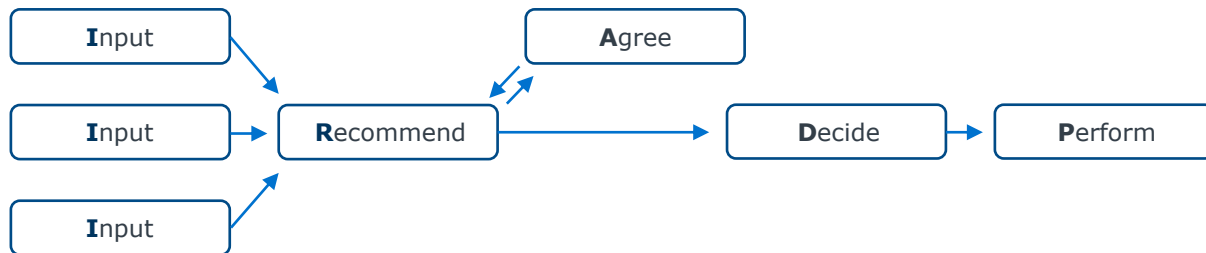


# Clarifying Roles When Complexity Demands It

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## Two Approaches to Resolving Decision-making Disputes

**Bain & Company's RAPID® Framework:** Primarily for Complex, Important Decisions



**The RACI Matrix:** Primarily for Assigning Roles in Project Management

**Responsible:** *Creates the deliverable*

**Accountable:** *Delegates and reviews*

**Consulted:** *Provides feedback*

**Informed:** *Is given status updates*

Project Tasks	Provost	Committee Chair	Faculty Senate
Create Committee Charge	<b>R</b>	<b>C</b>	<b>I</b>
Select Committee Members	<b>A</b>	<b>R</b>	<b>C</b>
Collect Relevant Data	<b>I</b>	<b>A</b>	--



# Translating Corporate to Higher Ed

Expanding Consultative Process and Asserting a “D” are Key to Success

**In most settings, the “R” drives  
80% of the work in each framework**

## **Recommend**

**A**gree

**P**erform

**I**ntput

**D**ecide

**80%**

Of the effort  
occurs here

## **Responsible**

**A**ccountable

**C**onsulted

**I**nformed

# Translating Corporate to Higher Ed

34

## Expanding Consultative Process and Asserting a “D” are Key to Success

### Shared Governance Requires Significant and Overt Consultation

**Recommend**  
**Agree**  
**Perform**  
**Input**  
**Decide**

80%

Of the effort  
occurs here

**Responsible**  
**Accountable**  
**Consulted**  
**Informed**

### Six Questions to Consider for Building a Consultation Strategy

- 1 Who do I need to engage first, second, and third, before broader conversation?
- 2 Do I have a preferred solution, or am I looking for “blank slate” ideas?
- 3 What data needs to be shared to provide context for the decision?
- 4 Who are the likely detractors, what drives them, and how will I engage them?
- 5 What are the time constraints for constituent feedback?
- 6 Do I need to update each constituent as the process unfolds?

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# Beyond the Board's Constructive Boundaries

Distracted by Reputation, Partisan Politics, Pet Projects, and Industry Hype

## Partisan Interference

- Slate of new gubernatorial board appointees promote explicit political agenda directly contracting their predecessors
- President asked to produce detailed accounts of all diversity programming, spending, and coursework

## Playing With Fire

- “Symbolic” **No** vote on tenure cases leads to near universal denial of promotions
- Provost forced into damage control to calm faculty concerns while educating board members on tenure policy and philosophy



## Passenger Seat Presidency

- Board chair organizes sudden removal of president over differences in vision, authoring detailed prescription for change
- Community and national outcry forces board to reinstate president; faculty senate demands that board leadership resign

## Personal Agendas

- Law school alum on board fixates on the school's recent rankings slide
- President forced to generate internal analysis on rankings methodology and peer comparisons, explaining enrollment, revenue, and selectivity trade-offs

Percentage of board members with professional experience in higher education

8.8% Public

9.5% Private

# Finding the Board's Strategic Sweet Spot

Topical "Altimeter" Needed to Generate Questions at the Right Level

## Questions for Board Discussion and Decisions



### Distracting Questions

- Show a lack of knowledge about the sector and key trends affecting it
- Steer the board toward topics outside of its purview
- Can spur controversy or debate that negatively impacts the institution



### Strategic Questions

- Appropriately allocate board effort on the issues that matter most for long-term success
- Leverage the unique expertise of board members
- Benefit from preparation and education about the broader higher ed landscape
- Address challenging and difficult topics in a productive, solution-oriented manner
- Take the deliberative and collaborative nature of shared governance into account






### Micro-Management Questions

- Focus on the right topics, but at a tactical altitude better suited for campus leaders
- Waste scarce board convening time on minutiae, rather than strategy
- Suggest a lack of trust in campus leadership and management

# Finding the Board's Strategic Sweet Spot

Topical "Altimeter" Needed to Generate Questions at the Right Level

	Enrollment	Academics	DEI
 <b>Distracting</b>	<p>Why aren't we cheaper?</p> <p>Why can't we get smarter, wealthier, and more resilient students?</p>	<p>Why can't we end tenure?</p> <p>We should be teaching more practical, life skills to this generation.</p>	<p>We shouldn't be hiring this particular professor.</p> <p>Are we teaching critical race theory?</p>
 <b>Strategic</b>	<p>Is our net tuition revenue per student sustainable?</p> <p>What's our desired mix of in-state, out-of-state, and international students?</p> <p>How are policy changes affecting our application volume and yield?</p>	<p>How are we measuring student learning and student outcomes?</p> <p>How do we build on our disciplinary strengths?</p> <p>Do we have the right mix of programs to meet our mission and margin goals?</p>	<p>Is our board reflective of and responsive to the communities we serve?</p> <p>What are our DEI goals, and who is accountable for progress against them?</p> <p>How do our outcomes vary by subgroup?</p>
 <b>Micro-Management</b>	<p>Which high schools are we visiting?</p> <p>What's our international recruitment plan?</p>	<p>We should launch XYZ specific program.</p> <p>Why are we researching X?</p>	<p>What do we spend on DEI staff and programming?</p> <p>How many non-white hires have we made last year?</p>

## Breakouts

### Sharing Your Experiences and Key Questions Around Change Leadership

- 1. What cultural context will you encounter in your new role?** Consider your predecessor's leadership style, relationships with the board, faculty, and other stakeholders.
- 2.** Which of the change leadership lessons discussed resonates most with you? Which will likely be most critical to success in the first year of your presidency?

# Related Deliverables and Services



## Executive Briefing

Overview of key trends, lessons, and tactics in a digestible format

*Forthcoming*



## Cabinet Diagnostic

Trust, Communication, and Decision-Making

Survey and diagnostic exercise designed for extended cabinets (President, Vice Presidents, Deans, and faculty leadership) to assess the strength and understanding of shared governance on your campus

*Forthcoming*



## Facilitated Workshops

1

### Shared Governance & Scenario Planning Workshop

Nine lessons for balancing agility, strategic clarity, and trust on campus

Decision-making scenario module focused on strategy “gray areas”

2

### Focusing and Elevating Board Governance

Overview of key trends and topics in higher education

Guidance on calibrating board attention to strategic priorities, not distractions or management



# See You Next Week!

*Tuesday, July 9, 2024 at 1 pm ET (Virtual)*

Understanding Generation P – Implications for Enrollment, Student Success,  
Mental Health & Wellbeing



**Michael Koppenheffer**  
*Vice President, Enroll360 Marketing,  
Analytics and AI Strategy*



**Dr. Ed Venit**  
*Managing Director, Strategic Research*



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