



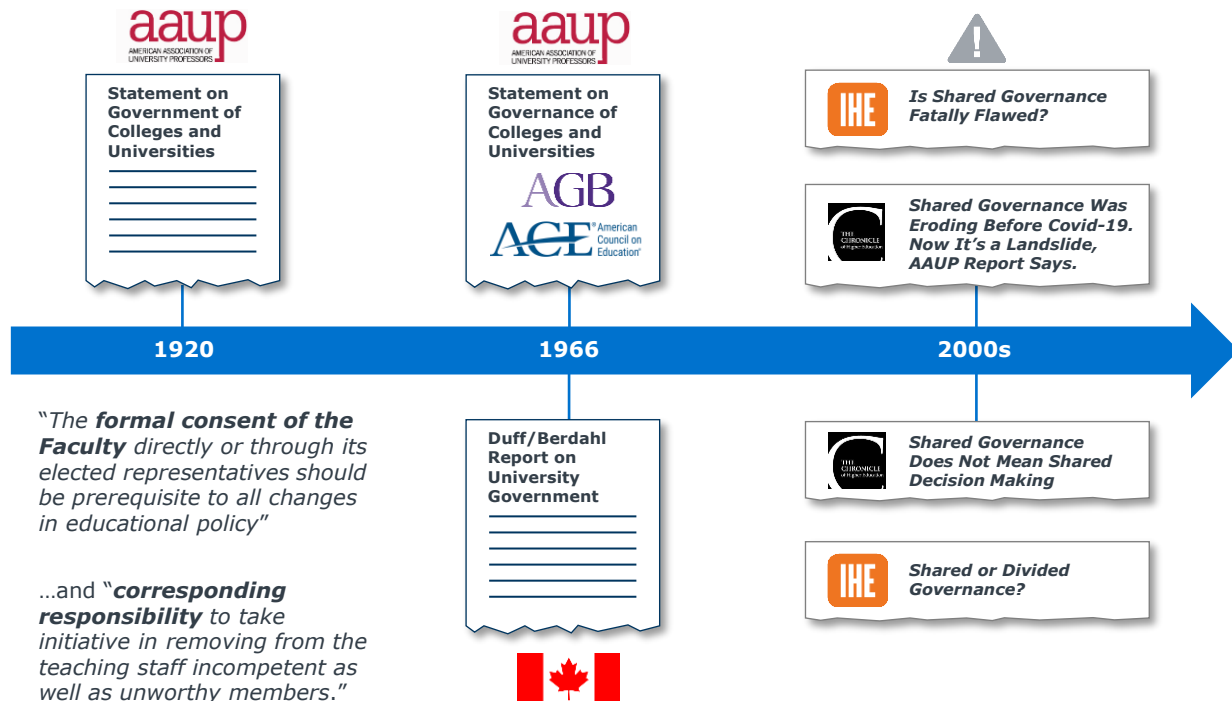
EAB

Shared Governance 2.0

Reinvigorating Leadership and Institutional Agility
in the Post-Pandemic Era

A 100+ Year History of Shared Governance

A Foundational Yet Perennially Fraught Concept in Higher Ed

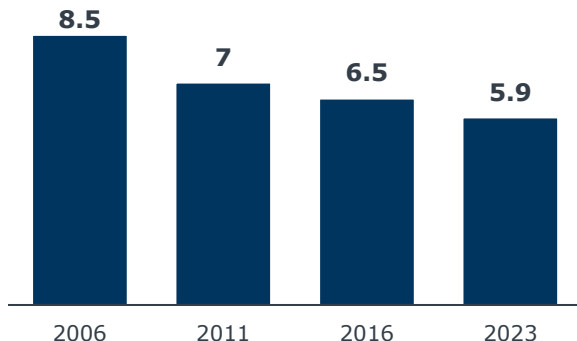


Sources: [AAUP](#), [Duff/Berdahl Report](#), Inside Higher Ed, ["Is Shared Governance Fatally Flawed?"](#) and ["Shared or Divided Governance?"](#); Chronicle of Higher Education, ["Shared Governance Was Eroding Before Covid-19. Now It's a Landslide, AAUP Report Says,"](#) and ["Shared Governance Does 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.

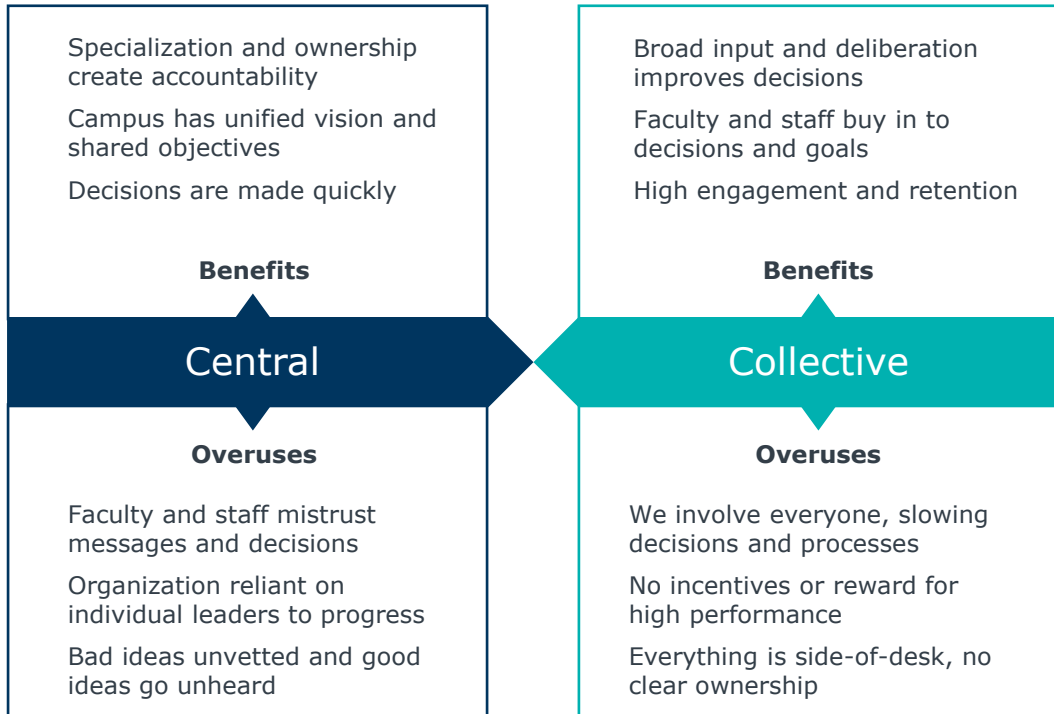
...The explicit or implicit goal of shared governance on a campus is something approaching consensus, and there are situations in which consensus is highly desirable ... **When the goal is transformational change, however, patient attempts to reach consensus are usually much less successful.**

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

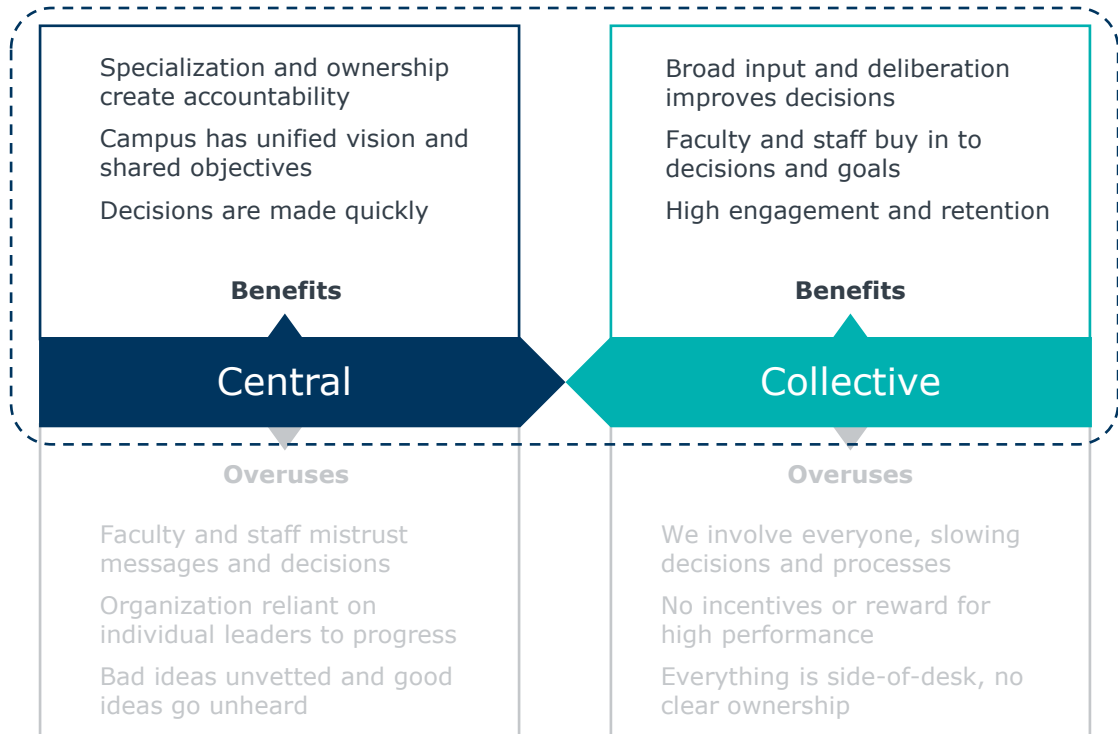
*Brian Rosenberg
President Emeritus, Macalester College*



Defining Effective Shared Governance



Defining Effective Shared Governance



A Realistic Path Toward Constructive Coalitions



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 Decommitt



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



Driving Change in the Context of Shared Governance

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
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Structural Reform



- 5 **Agree on discrete decision rules and roles** for important, cross-functional institutional matters
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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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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

Driving Change in the Context of Shared Governance ¹¹

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From Mission, to Vision, to Strategic Direction



Effective Leaders Articulate Clear “Forks in the Road” to Explain Change

Generic

University Mission Statements

Strategic Implications



The mission of R1 U¹ is to educate individuals in the liberal arts, languages, sciences, learned professions, and other courses and subjects of study, and to conduct scholarly research and publish the findings of such research.

- Unbounded, undifferentiated comprehensiveness
- Does not constrain or guide strategy



ASU is a comprehensive public research university, measured not by whom it excludes, but by whom it includes and how they succeed; advancing research and discovery of public value; and assuming fundamental responsibility for the economic, social, cultural and overall health of the communities it serves.

- Takes rankings and selectivity climb off the table
- Steers research output toward application and public interest
- Avoids town/gown distinction and places Tempe at center



We are dedicated to delivering quality education and experiences that produce outstanding environmentally competent professionals and inspire individuals from all walks of life to steward sustainable ecosystems.”

- Doubling down on environmental programs
- Expands audience beyond traditional, residential liberal arts market

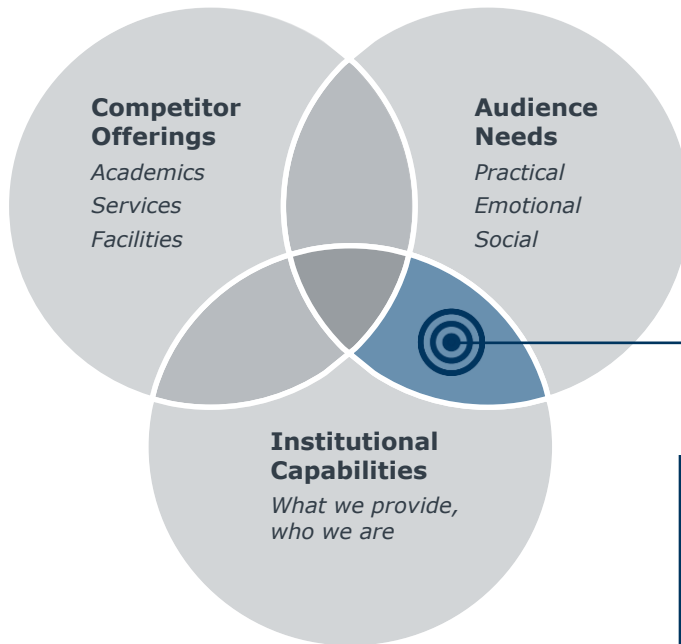
Specific

1) Pseudonym for an R1 University in the US.

Focusing on Your Differentiation Sweet Spot



Industry Context: *Demographics, technology, regulation*



Differentiation Sweet Spot

Where your institution meets audience needs in ways competitors can't

EAB-led **SWOT Analyses** and **Differentiation Workshops** can help your cabinet identify, refine, and promote a unique set of market-informed “bets” and avoid “all things to all people”

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Numbers Without a Narrative

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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



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

Driving Change in the Context of Shared Governance 17

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A Lesson from the Pandemic



Scenario Planning Discipline Can Yield Long-Term Organizational Benefits

Faced with a global pandemic...

COVID-19: Will Colleges Reopen This Fall?

Cultural and operational readiness varied wildly

Stumbling Through U

Uncoordinated and internally contested response

Disaster Prep Academy

Prior emergencies and routine scenario planning removed guesswork from response

Sustainability driven by advance preparation

- 1 Weakened trust:** Exec overreach creates backlash
- 2 Temporary unity:** Crisis environment provided ~6 months of goodwill
- 3 Organizational normalcy:** Community anticipates and adjusts to external pressure

Key Conversations Worth Having to Prevent Campus “Immune Response”

What level of enrollment is sustainable (and realistic) for our campus?

What is the ‘optimal’ mix of faculty roles and ranks for us?

Is our budget model transparent and effective at advancing our goals?

Which programs are truly distinctive, and which are underperforming?

How are we measuring success for tenured faculty? Is it fair? Is it working?

How should we deal with a significant drop in funding, assuming both waiting and protesting won’t work?

Two Approaches to Difficult Conversations

Six Thinking Hats



Blue: Steer the meeting



Yellow: Be optimistic



Green: Be creative



White: Be analytical



Red: Be emotional



Black: Be critical

Deliberative Dialogues

Often used in educational settings to help students practice talking about controversial issues

Trained Facilitator: Moderates the discussion and presents an “issue guide” framing 3-4 different approaches to the issue.

Discussion Choreography: Participants explore each approach, considering:

- Appeals
- Concerns
- Costs
- Consequences
- Trade-offs

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Breaking Down “Us vs. Them” Boundaries

21

Four Ways to Grow Cross-Silo Awareness and Familiarity

Formal



Faculty Liaisons for Key Staff Functions

Senate and Cabinet Cross-Representation

Faculty and Staff as Ex-Officio Board Committee Members

Board

Administration

Faculty

Staff

Annual Offsite Retreat with Future Visioning Exercise

Receptions for New Faculty Hires

Coffee (*or Cocktails*) with President/Provost/Dean



Social

Driving Change in the Context of Shared Governance

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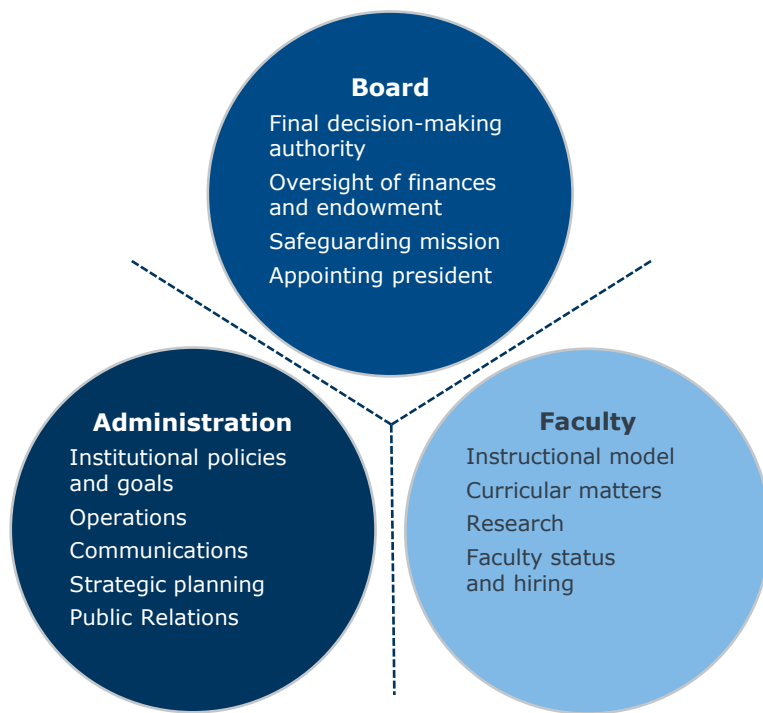
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The Hypothetical: Separation of Powers

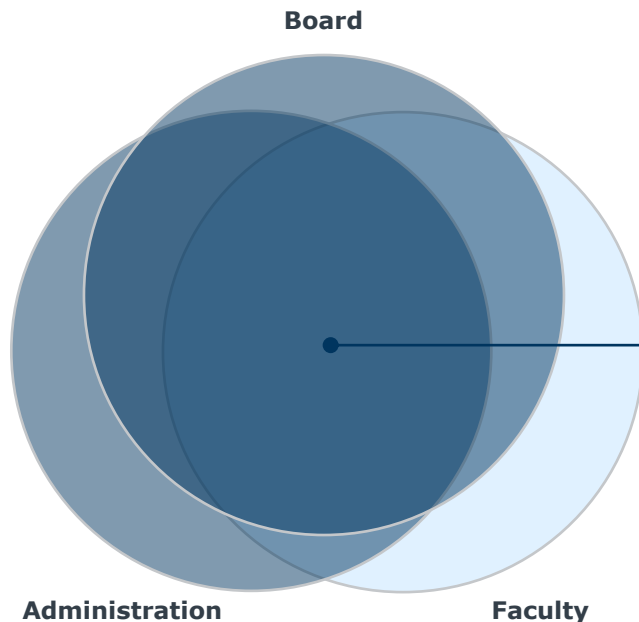
Formal “Swim Lanes” Delineate the Ultimate Domains of Each Group



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

24

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?

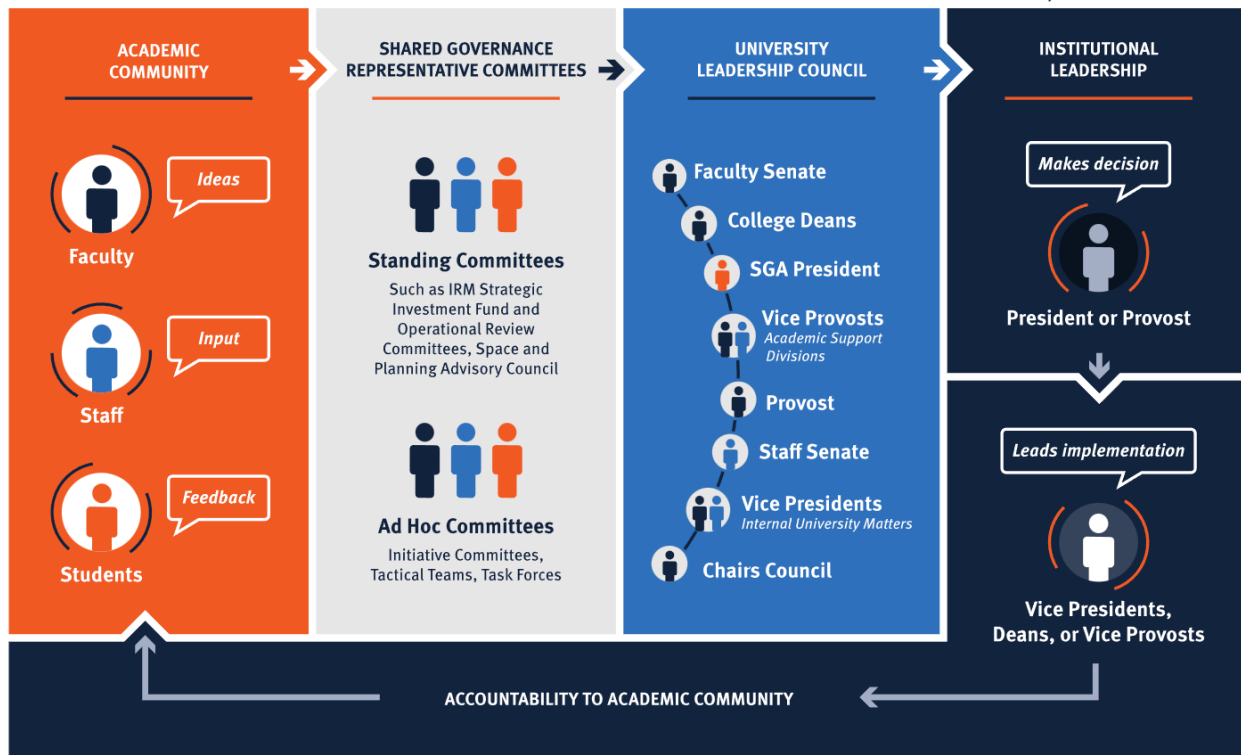
Visualizing Shared Governance

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Shared Governance for **University** Matters

UTSA

The University of Texas at San Antonio™



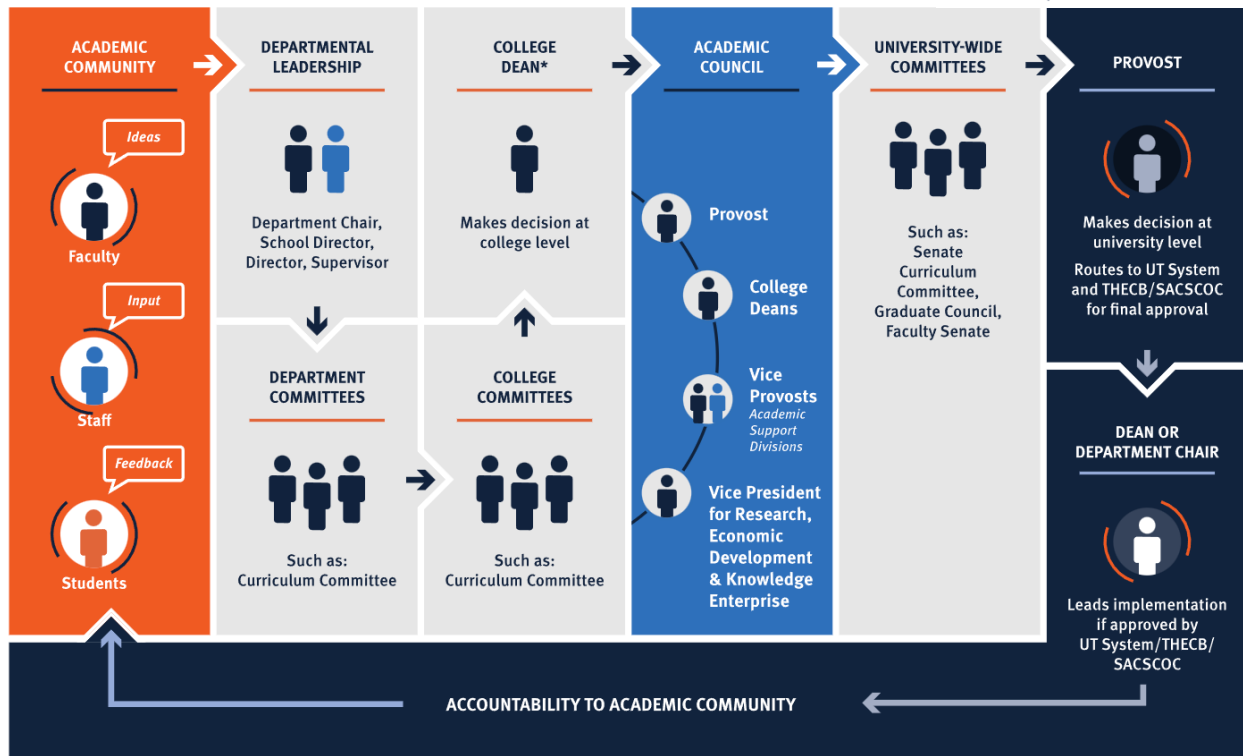
Visualizing Shared Governance

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Shared Governance for Academic Matters

UTSA

The University of Texas at San Antonio™

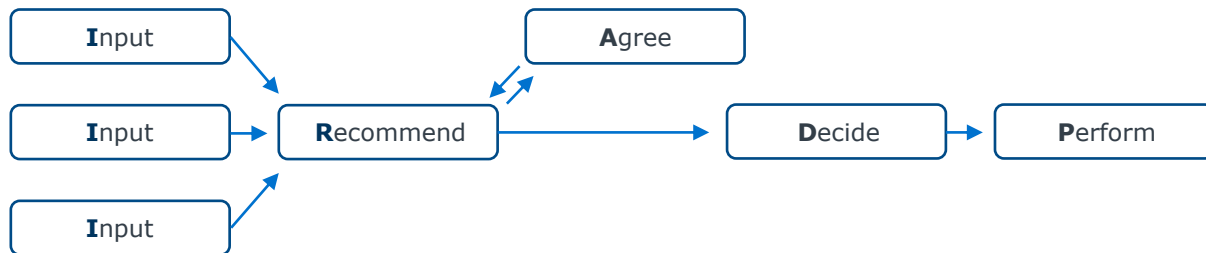


Clarifying Roles When Complexity Demands It

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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	R	C	I
Select Committee Members	A	R	C
Collect Relevant Data	I	A	--

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

Agree

Perform

Intput

Decide

80%

Of the effort
occurs here

Responsible

Accountable

Consulted

Informed

Translating Corporate to Higher Ed

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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Chairs Often in an Impossible Position

More Temporary Representative than Divisional Leader

Chairs receive little meaningful training...

67% Receive no formal training

40% Of existing trainings last < 5 hours

66% Say training didn't prepare them for the job

...but influence innumerable departmental decisions

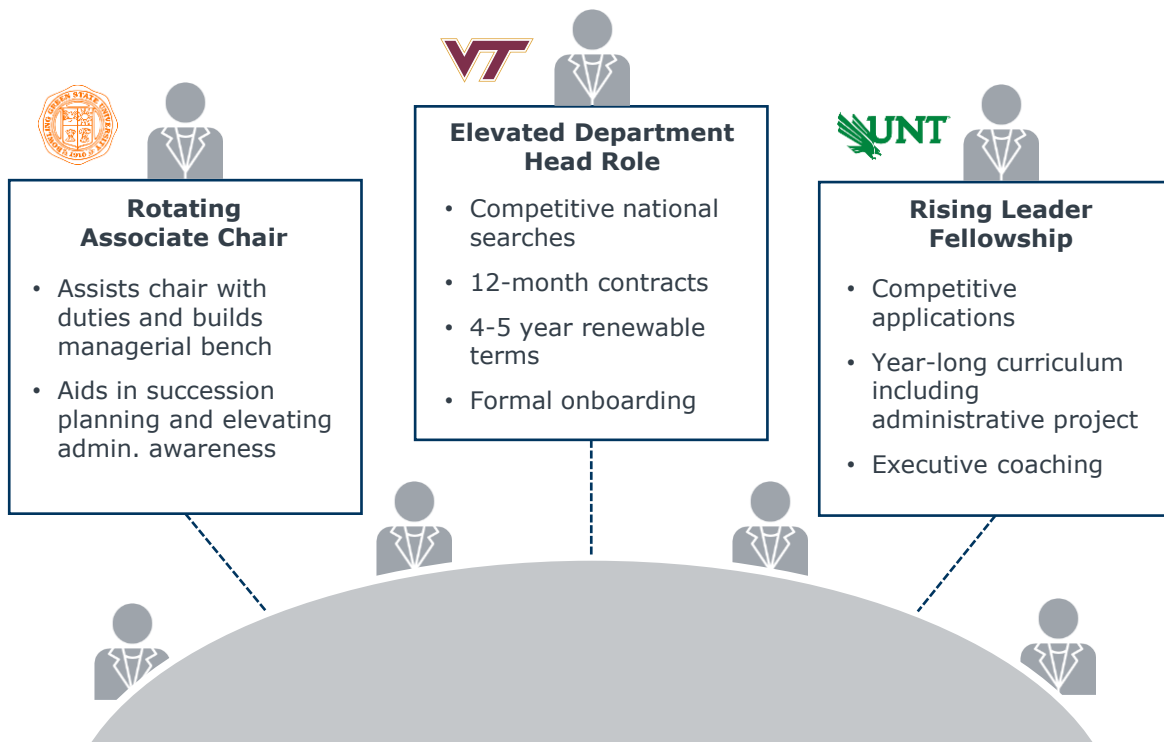
- Faculty recruitment
- Promotion and tenure
- Workload and releases
- Course scheduling
- Student advising
- Program design
- Faculty evaluation
- Pedagogical support



Three Approaches to Improving Unit Leadership

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Elevating Managerial Skills Within the Faculty Ranks



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Where Initiatives Go to Die

Dysfunctional Deliberative Bodies Stall Institutional Progress

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The Charge... How Do You Frame the Question?

Curriculum Review Charge

Clarify and simply the core curriculum

Expand exploration and creativity

Rethink our vision for disciplinary

"Blue Print" ideas:

- Fewer credits required
- Pass/fail option once per term
- Thematic course clusters
- Required minors
- Mentored project

Faculty objections:

- Language requirements reduced
- Separate seminars detract from breadth
- Too few liberal arts requirements
- Urgency questioned

Process "Put on Hold"

After limited progress in building consensus and even verbal attacks on committee members, deans agreed to pause the work indefinitely.



The Composition... Who Do You Ask to Serve?



"I'm having a hard time picking people for committees. People that volunteer can be obstructionist; they can't get things done in a timely manner. Handpicking members, you get flack for picking 'yes people.' The good faculty are busy with research and don't have time to sit on these committees."

Provost, Regional Public University

Crafting a Clear Charge



Effective Committees Have Clear Scope, Timelines, and Admin. Support

Student Retention Taskforce

This taskforce will produce an analysis of student attrition at EAB U and provide recommendations with accompanying resource estimates to improve overall term-to-term retention by 5% in 5 years.

Attrition Analysis Timeline: 6 months

Strategy Recommendation Timeline: 6 months

Members will meet every two weeks and produce monthly progress reports to be reviewed by the provost. An initial analysis of student outcome data will be provided to the taskforce including historical retention rates by demographic, major, Pell status, high school academic preparation, and available campus engagement data.

Members:

- Vice Provost of Student Success (Chair)
- Relevant, cross-functional representatives
- Project management / data specialist

Clear deliverable expectations

Asked to consider costs

Performance target predetermined

Deadlines and milestones established

Regular progress updates required

Important contextual data provided, limiting reliance on anecdote or multiple versions of the truth

Chaired by executive sponsor

Support staff involved to carry forward operational tasks

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The Innovator's Dilemma, *Redux*

Clayton Christensen's Famous Conclusion

“

When a company's capabilities reside in its processes, and when **new challenges require new processes**—that is, when they require different people or groups in a company to interact differently and at a different pace than they habitually have done—**managers need to pull the relevant people out of the existing organization and draw a new boundary around a new group.**

When the mainstream organization's values would render it incapable of allocating resources to an innovation project, the company should **spin it out as a new venture.**

”

Bringing Innovation In-House

Encourage, Support, and Scale Your Faculty's Best Ideas

Christensen's "Autonomous Business Unit" Model Manifest in Higher Ed



3,000 on-campus undergrads



170,000 online students

President Paul LeBlanc's Vision Becomes Reality

- Traditional campus faced post-recession decline
- Christensen joins SNHU board
- Separate online division built for extreme scale



33,000 undergraduate students
17,000 graduate students

Transforming Learning for a Third Century (TLTC) Initiative

- \$25M in funding across 128 projects over 10 years
- 350+ faculty and staff members involved
- Project structure decentralized, with some central supports



17,000 undergraduate students
5,000 graduate students

The Provost's Challenge

- \$3M in funding for 24 projects over 18 months, "no pilots allowed"
- Teams assigned a project manager from Academic Affairs
- RFP designed around 3 thematic questions (*not answers*)



4,500 undergraduate students
1,000 graduate students

The Transformation Lab

- University-wide catalyst for vetting, designing, and launching new models of education, revenue streams, and operations.
- Reports to Vice President of Strategy & Innovation + Provost

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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
 Distracting	<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>
 Strategic	<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>
 Micro-Management	<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>



EAB

Shared Governance 2.0

Reinvigorating Leadership and Institutional Agility
in the Post-Pandemic Era