



Ohio  
Wesleyan  
University

# **FALL 2008 UPDATE**

# Ohio Wesleyan University

## Fall 2008 Update

Given the significant changes in leadership at Ohio Wesleyan during the past year and the renewed planning that has occurred as a result, the University thought that a supplement to the *Self-Study Report*, outlining the events of Fall 2008 and the plans for the remainder of this academic year would be helpful to the Higher Learning Commission and the accreditation visit team. The scope of the events and potential new directions are sufficiently broad that trying to incorporate these items into the *Self-Study Report* during the revision process seemed awkward. We opted to let the *Self-Study Report* describe the previous nine years and will describe our continued progress and new initiatives in this update. The structure of the *Fall 2008 Update* will not follow the HLC Criteria and Core Components, though the relevance of material to these areas will be noted parenthetically throughout the document.

### *Highlights of Fall 2008*

The centerpiece of the fall semester was the Inauguration of Ohio Wesleyan University's sixteenth president, Rock Jones, on October 10. The celebration included presentations by students, a distinguished panel discussing "Whither the Liberal Arts," an inspiring inauguration ceremony attended by dignitaries from around the country, and an all-campus dinner and entertainment on the JAYwalk. President Jones' inauguration address laid the foundation for the directions that the University is now making plans to take. Putting substance behind his forward-looking words, he announced the addition of two full-time, tenure-track faculty positions to be added for the 2009-10 academic year during his address (7.24).

These positions were approved by the Board of Trustees following a presentation by President Jones outlining the need for substantial growth in the size of the faculty. This growth is necessary in order to reduce the size of entry level courses, reduce reliance on instruction by part-time faculty in first-year courses in certain departments, address the pedagogical need for a larger number of smaller seminars and tutorials in upper-level courses, and provide greater opportunity for individual mentoring and guidance by faculty in their work with students in the classroom and in planning educational experiences beyond the classroom. Reviewing benchmark data from peer institutions, President Jones suggested the need to add a minimum of 17 faculty positions. The trustees approved his recommendation to fund two positions in the operating budget in 2009-10 and to begin immediately working with donors to secure gifts to endow 15 additional positions (2B).

The same weekend as the inauguration, the Student Union on Black Awareness celebrated its fortieth year at Ohio Wesleyan (5B). Also

notable in the fall semester were the Sagan National Colloquium events, including speakers such as Woodrow “Woody” Clark ('67) who shared in the 2007 Nobel Peace Prize for his part in the making of *An Inconvenient Truth*. For the first time, the National Colloquium involved student-directed projects related to the theme of “Cultivating a Green Campus.” Also, for the first time in many years, the colloquium events are continuing during the spring semester (4A).

OWU was featured in the 2008-09 edition of *Colleges of Distinction*. We were also honored by being placed on the President’s Higher Education Community Service Honor Roll “with distinction” for our 2008 community service participation. This included recognition of our spring break mission week, Big Brothers Big Sisters, Upward Bound and Columbus Initiative (5B) (5.9).

### *Administrative Changes (1D)*

Within the last year, several key administrative positions have been filled by persons new to the Ohio Wesleyan community. Notably, the President and three of the five vice-presidential level officers are (or will be) new appointments.

**President:** The presidential search was conducted during Summer and Fall 2007, with the unanimous selection of Rock Jones as the sixteenth president of Ohio Wesleyan announced on December 17, 2007. Dr. Jones was the Executive Vice President and Dean of Advancement at Hendrix College, where he had served in a variety of capacities since 1995. Dr. Jones attended the January 2008 meeting of the Board of Trustees and came to campus several other times during Spring 2008. He began his term as president on July 1, 2008 and was inaugurated on October 10, 2008.

**Vice President for Student Affairs:** This search was conducted during Spring 2008, with input from President-elect Jones. Craig Ullom, having just finished a Semester at Sea as part of the University of Virginia’s program, came to Ohio Wesleyan on August 1, 2008, with 33 years of experience in the area of student life. His most recent land-based position was Associate Vice President for Student Development and Enrollment Services at the University of Central Florida. The elevation of this position from Dean of Students Services to Vice President for Student Affairs reflects the importance that Ohio Wesleyan places on the total college experience of our students (5A).

**Vice President for Finance and Administration:** This search was also initiated during Spring 2008, with input from President-elect Jones. Eric Algoe was named to this vice-presidential position on July 22, 2008 and began his work at Ohio Wesleyan on August 25, 2008. His previous position was chief operating officer at the Ohio School for the Deaf and the Ohio State School for the Blind.

**Vice President for University Enrollment and Strategic Communication:** This search was conducted during Fall 2008. In November William

Preble was selected for this position. He is currently Dean of Admission and Financial Assistance at Hanover College in Indiana. He will begin at Ohio Wesleyan on March 1, 2009.

During the last six months we have also filled or are in the process of filling the following higher-level administrative positions:

Budget Manager (filled January 2009)

Director of Career Services (filled July 2008)

Director of Human Resources (search underway February 2009)

Director of University Communications (search underway February 2009)

### *Strategic Planning (2A, D)*

On September 22, President Jones reconvened the Strategic Planning workgroups from 2006, with additional community members invited to join the previous workgroups. The eight workgroups comprise 40 people: administrators, faculty, students and a trustee. The participants are from across campus and have widely varying tenures at the University.

President Jones noted that much background work in the planning process had been done already. We need to revisit and finalize that work so that a differentiating and compelling vision for the University can be agreed upon and be used as a basis for prioritization of institutional goals, resource allocation, and more effective fund raising. The Strategic Plan should have four or five initiatives with cross-cutting themes that draw from the work of multiple groups. Under the initiatives will be action items and associated costs.

The development of the strategic plan will include articulation of a strategic vision, key strategic initiatives, objectives that will fulfill the strategic initiatives, and a comprehensive financial plan to acquire the resources necessary to implement the plan and fulfill the vision. It is expected that the resources for funding the strategic plan will include resources acquired through the capital campaign to increase annual support of operations; create new endowment support for new and existing programs, including new faculty positions; and fund capital projects on the campus; strategic reallocation of existing resources through an enhanced budget process; and enhanced net tuition revenue that will result from a stronger and more differentiated articulation of the academic program and a more effective admission operation. The addition of a Budget Manager provides the opportunity to develop a strategic five-year budget model that will enhance planning efforts.

The schedule for these final stages of the strategic planning process involved workgroups meeting throughout the fall semester, reviewing and strengthening what prior groups had done. The chairs of the workgroups met in late December to report on their groups' findings. In February a draft of the plan, an "action document," will be completed and reviewed by those most directly involved with the planning and implementation. The revised document will then be circulated to the University community (6.11). The process of review and revision will be

led by President Jones and will include significant support from the Officers of the University, the University Governance Committee of the faculty, the University Review committee of the Board of Trustees, and the chairs of the eight work groups. Forums will be held for faculty, student leaders, administrators, clerical staff, and other interested constituencies. President Jones will continue a 30-city tour with presentations to alumni, parents, and other individuals with interest in Ohio Wesleyan University, soliciting their input on the strategic plan and the future of OWU. The goal is to present to the Board of Trustees at their May 2009 meeting a recommendation for a Strategic Plan.

### *Art & Science Study (4B, C)*

At the January 2008 meeting of the Board of Trustees, then President-elect Rock Jones asked the Board to engage the Art & Science Group to conduct a study and make recommendations about how Ohio Wesleyan could distinguish its academic program in a meaningful and effective fashion toward the aim of attracting stronger students and strengthening the position of the University. David Strauss and Susan May of Art & Science began working with Ohio Wesleyan in February 2008. Their initial visits to campus were investigative and involved discussions with a wide range of groups. They then began regular meetings with a steering committee of about twenty faculty and administrators that acted as a consultative body for developing the particulars in a strategic positioning study and then interpreting the results. During the spring and summer Art & Science conducted two rounds of interviews with a subset of students who had inquired about, applied to, and/or matriculated at OWU for Fall 2008. In August and September the results of these interviews and a thorough analysis of their implications were presented to the steering committee. In October the research results were presented to the OWU community. In December recommendations based on the findings were presented to the steering committee and then to the entire community. In January the findings and results were presented to the Board of Trustees in an off-site retreat. Art & Science found that two programmatic initiatives showed promise for increasing the number and academic preparation of applicants and matriculants. The first of these two initiatives involves having all students participate in a “theory-into-practice” model. Hands-on learning would serve as a defining pedagogical principle and specially designed activities such as research and internships (on or off campus) would be extended. The second initiative involves an extensive level of “international awareness” and incorporation of global topics into courses and student experiences. Art & Science studies showed that the “theory-into-practice” model would be more attractive to and increase enrollments of lower-income students, while the “international awareness” initiative was more attractive to higher-scoring, higher-income students. Art & Science presented a couple of scenarios for how these two initiatives might be realized in the OWU curriculum.

Art & Science studies also revealed that having a “tightly-knit community” was an important factor in recruiting students. They observed that prospective students tend to rate our community as more

connected than seems to be the case when students arrive. They suggested that part of our attrition might be attributable to the lack of community and that improving the connectedness could help us with both recruiting and retention.

In response to the Art & Science report, President Jones announced the formation of the Art & Science Review Task Force, which is charged with reviewing the curricular recommendations of the Art & Science Group and developing proposals for consideration by appropriate faculty committees and, ultimately, the faculty as a whole. The task force was asked to not be restricted by current resource limitations but to explore possibilities for a bold, universal curricular initiative and to note the resources that will be required to fulfill the initiative. It is hoped that the committee can complete its initial work in Spring 2009.

The Task Force is co-chaired by a faculty member from the University Governance Committee and the Dean of Academic Affairs. Membership on the committee consists of ten faculty members, four administrators from Academic Affairs and three administrators from Student Affairs. . A second task force will be appointed specifically to address issues related to creating a more “tightly-knit community” and will focus on initiatives that extend beyond the curricular initiatives that are the primary purpose of the initial task force. The two groups will work collaboratively with some overlap in membership.

## *Additional Studies*

### *Internal*

#### **Fall**

A Greek Life Study Group was formed consisting of campus members, alumni, and trustees to investigate ways in which Greek life at the University can be more effective. The closing of two fraternities within the last year is part of the impetus for this study group and the sharp decline in Greek membership over the past decade led the Board of Trustees to adopt a resolution in May 2008 calling for this study (5 A).

A Residential Life Task Force was formed to continue the discussions related to planning for organization, renovation and new construction of residence halls and small living units, as well as recreational and community spaces, consistent with the Campus Master Plan (5A). The task force is charged with exploring needs for enhancement of residential facilities and opportunities for improving the quality of residential life through the development of learning communities in all residential facilities. The task force has articulated a set of principals that will guide residential life in the future. These principals include offering a variety of lifestyle options with opportunities for progressive independence during the four years at OWU.

Work from the Greek Life Study Group, supplemented by ideas from the Residential Life Task Force, was presented to the Board of Trustees at

their January 2009 meeting (6.14) along with recommendations for next steps. The Trustees allocated funds for additional study of renovation of Greek Houses and residence halls and asked for a comprehensive plan for renewal of all residential facilities and, if necessary, construction of additional facilities. The proposals for Greek Houses include the possibility of returning management of the fraternity houses to the University with the University making substantial capital investments in the renovation of the houses and assuming responsibility for dining services in the houses. Plans include renovation of fraternity houses and three Small Living Units in a phased fashion. The Board approved up to \$150,000 for architectural and engineering planning to be conducted this spring and presented to the Board at their May 2009 meeting (5A).

### ***Spring***

Growing out of the Sagan National Colloquium emphasis for 2008-09, President Jones announced in December the formation of President's Task Force on Campus Sustainability. The group is charged with developing recommendations that will lead to a culture of sustainability on the Ohio Wesleyan University campus. Specifically, the task force will examine the national President's Climate Initiative and develop a roadmap for fulfilling commitments made in the initiative and recommend a timeline for specific actions Ohio Wesleyan University can take to become more environmentally responsible. The task force will present its initial recommendations to the President prior to the end of the spring semester 2009. The membership of the task force includes students, faculty, staff, administrators and a trustee (2A, 5B).

The Art & Science Review Task Force is described in the section entitled "Art & Science Study."

### ***External***

In February President Jones announced the appointment of an Information Technology Task Force to develop a comprehensive plan for the future of information technology at Ohio Wesleyan University. Shortly after his arrival in July, President Jones identified significant gaps in information technology on campus, including underdeveloped educational technology and administrative systems and processes that seemed to be a decade behind best-practice institutions in the use of technology and, thus, in services provided to students and to employees. President Jones engaged Terry Dillow and Dan Knoble of Technology and Management Design (TMD) to conduct an audit of information technology at Ohio Wesleyan. The results of the TMD audit were presented to the Officers in late December and to the full campus and to the Board of Trustees in January (6.19). TMD has now been engaged to provide counsel and direction on all aspects of information technology for an interim period. TMD will work with the information technology staff and the newly-created Information Technology Task Force to oversee development and implementation of the plan, to assess strategic issues for infrastructure, services, and staffing (2B, C).

Also shortly after his arrival, President Jones identified significant shortcomings in the services offered by the Department of Human Resources. The Director of Human Resources unexpectedly resigned in late August 2008. President Jones engaged Sibson Consulting to conduct an audit of staff and operations of the Office of Human Resources. Sibson held two open sessions in December 2008 for input about human resources at Ohio Wesleyan and reported its findings and recommendations to President Jones in January 2009. Sibson will provide assistance in implementing key recommendations. The search for a Director of Human Resources was unsuccessful in Fall 2008. The University will engage external assistance in strengthening the pool of candidates and hopes to complete the search in early Spring 2009 (5A).

The audit of Ohio Wesleyan University's financial statements for 2007-2008 found that the financial statements were clean but that there were material weaknesses in the University's financial controls. President Jones immediately engaged Larry Goldstein of Campus Strategies and former Vice-President of the National Association of College and University Business Officers to conduct an audit of our internal controls and to make recommendations for improving our controls. Findings and recommendations are expected in middle or late February. The audit finding is related, in part, to the deficiencies in information technology and the failure of the university to invest in appropriate financial systems and in training of staff of appropriate use of existing systems.

### *Teaching and Learning (3B)*

One of the members of the Teaching, Learning, and Cross-Cultural Programming Committee (TLCCPC) inaugurated a Teaching Circle in Fall 2008. The faculty interest was so great that two meeting days were required to accommodate all those who wanted to participate. The total number of regular participants is about two dozen, including staff from the Sagan Academic Resource Center as well as teaching faculty. In the fall the groups read and discussed L. Dee Fink's *Creating Significant Learning Experiences*. Members reported trying ideas from Fink's book even in the middle of the semester. One faculty member is using Fink's book with two students who have proposed a seminar for Fall 2009. The students, with the guidance of the faculty member, will design the seminar using Fink's guiding principles. During the spring semester the two Teaching Circle groups are reading Barbara Wolvoord's *Effective Grading*. The groups meet once per month at noon, with lunch provided by the Dean of Academic Affairs.

TLCCPC also conducted a survey in Fall 2008 regarding the types of teaching workshops that faculty would find most interesting and useful. The workshop topics covered ideas raised by the Introductory Best Practices group in their summer survey, as well as others.

## *GLCA Mellon Grant*

In early February 2009, The Great Lakes Colleges Association (GLCA) announced "a multi-million dollar grant from the Andrew W. Mellon Foundation to launch a new four-year program, beginning in 2009, to provide professional development and career enhancement opportunities to faculty members in the middle phases of their careers. Called the GLCA/New Directions Initiative for Faculty Development, this program will offer professional opportunities to the faculty members of GLCA member colleges in three areas: (a) campus-based and consortial activities to help mid-career faculty members broaden their horizons and understand issues beyond the context of their own disciplines; (b) activities to provide faculty members with opportunities to revisit their pedagogies, based on expanding knowledge and best practices for teaching both within and beyond particular fields of study; and (c) professional development grants, awarded on a competitive basis, to accord individual faculty members the time from regular duties required to chart new directions. A key emphasis of this program is to help mid-career faculty members think outside traditional boundaries of their disciplines and of faculty work." Each GLCA college will provide a one-third time facilitator to work with faculty on their campus to discover needs related to the grant, to work with the GLCA and other facilitators to develop consortial programs, and to serve as communicator between campus and GLCA.

## *Teagle Proposal (2C, 3A)*

Three of the Five Colleges of Ohio (Ohio Wesleyan, Kenyon, and the College of Wooster) are completing the third year of a study on assessing creativity and critical thinking, funded by the Teagle Foundation. The campus leaders involved with the first Teagle grant submitted a response to Teagle's January Request for Proposals on "Systematic Improvement of Student Learning" and were selected to submit a full proposal by March 30. Only 15 of the 76 pre-proposals were invited for this second round. The proposal, "From Bureaucracy to Pedagogy: Encouraging Faculty Ownership of Assessment," will focus on developing effective measures of student learning related to selected general education requirements at the participating institutions.

## *Financial Outlook (2A)*

Like all institutions, organizations, and families, Ohio Wesleyan University has been affected by the global economy. The most obvious impact is on our endowment, which has fallen from a peak of nearly \$200 million to approximately \$138 million. While a decline of 31 percent is staggering, it is helpful to remember that most major indices have fallen between 35 and 40 percent. The Investment Subcommittee of the Board of Trustees' Finance Committee continues to provide excellent stewardship of our endowment. With the assistance of our endowment advisors, the committee rebalanced a portion of the endowment in ways that it hopes will provide short-term protection and long-term growth.

President Jones has recommended and our trustees have set an endowment payout next year of \$8.5 million. This is nearly \$750,000 less than the amount previously allocated for next year. However, with the deep drop in the endowment, we believe this is a prudent move in the short term that protects our endowment for the long term. The officers will work with the University Governance Committee and budget managers to identify opportunities for strategic budget reductions that do not affect the academic program or the quality of education our students receive. These strategic cuts will allow the University to continue to allocate resources for strategic enhancement, including the two new faculty positions that were approved in October.

Ohio Wesleyan University has faced liquidity challenges with the CommonFund. These challenges have not adversely effected our operations, as the funds housed in the CommonFund included reserves and funds restricted for the construction of the Meek Aquatic and Recreation Center, which will not begin until Summer 2009. We have now accessed close to 70% of our resources contained in the CommonFund. We also have been adversely affected by challenges in the variable-rate bond market. We have monitored this situation carefully and are exploring options for restructuring our debt in ways that proved greater stability for the future.

The fiscal year 2007-08 ended with a surplus of \$1.9M. Very early projections given to the Board of Trustees in October projected a possible surplus of \$1.5M for 2008-09. The Board of Trustees, at their October 2008 meeting, voted to create a Cash Reserve Account with budget surplus funds that will grow over time and “provide resources to meet strategic opportunities and/or to respond to unanticipated revenue shortfalls.” Expenditures from this account, up to 10% of its value, may be authorized by the President. Beyond this amount the Finance Committee or Executive Committee of the Board must approve the expenditure.

A much needed budget manager was hired (for the first time) and began work in January 2009. Along with a new budget process, which is being implemented now, budgeting at the University should become more strategic, efficient, and effective. These steps should also help as we face the economic challenges ahead.

### *“In Concert with Rock” Tour*

As part of his plan to get acquainted with the OWU “extended family” and to build paths of communication with external constituents including alumni, parents, and friends, President Jones will visit thirty cities between the middle of October 2008 and the middle of May. During these dinner meetings, the President will solicit input for the Strategic Plan and build support for the emerging vision for the future of Ohio Wesleyan University. Participants at early gatherings were quite pleased with the events (5A).

In addition to his “tour,” President Jones has invited OWU supporters to give \$10,000 beyond their usual contribution to the University for an hour conversation with him about the institution. This year he will raise about \$400,000 with this approach, money that can be used for special needs and initiatives. He has solicited input for these initiatives from the OWU community and has allocated the initial funds to provide additional, emergency financial assistance to students whose families have been adversely affected by the loss of jobs in this economy, to see ideas and programs for faculty and students to connect theory and practice both on campus and off campus, and to enhance retention initiatives by creating programs that support students in the transition to OWU.

### *Conclusion*

Much is happening at Ohio Wesleyan. Each week we wait to submit this update adds more news of plans and progress. While a university’s story is never complete, ours is unfolding more rapidly at the time of this accreditation than would typically be true. So despite the title of this section, there is no conclusion at this point, nor will there be in March. We trust that the promise of plans to be discussed and consensus to be reached in the next few months will be strengthened by conversations during the accreditation team’s visit.