Critical competencies for leading major institutional restructuring in higher education (aka Big Scary Change)

Executive summary

Between 1957 and 2011, total university and college enrollment increased by 536%, from 3.3 million to 21 million, and the number of both public and private institutions of higher education (IHEs) grew rapidly. Then, between 2013 and 2021, 97% of all IHEs experienced a decline in student enrollment. Smaller institutions with enrollments under 1,000 experienced the most catastrophic declines (averaging 35%). After 55 years of consistent, predictable growth, the underlying economic driver of IHEs suddenly shifted 180 degrees, creating the need for leaders to completely rethink their approach to leading these institutions. Given the magnitude of change in IHEs, the typical "safe solutions" that have been applied to gently guide the growth and evolution of these organizations are no longer sufficient. The simple truth is that what was unthinkable only 15 years ago—the closure of these established institutions—is becoming increasingly commonplace.

For some IHEs, the changes required might be straightforward adjustments regarding staffing, curtailing new program development, eliminating acquisition of new equipment or facilities, and so forth. For many others, however, addressing these challenges will require completely rethinking how they have traditionally operated. Their leaders may need to consider significant institutional restructuring, including mergers, corporate conversions (e.g., for-profit to nonprofit models or vice versa), and closures. Restructuring to that extent can impact the institution's corporate structure, autonomy, management, governance, name, affiliations, and even its heritage. This level of change, restructuring, and realignment— usually expected to occur at an accelerated pace—is what we call "Big Scary Change" (BSC).

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BSCs are quite different from the usual changes and "transformation" undertaken on many campuses. BSCs in higher education also differ somewhat from mergers and acquisitions in other industries, although there are many lessons to be learned from those transactions. BSC implies major changes in the corporate and institutional structure of an IHE, with new and different kinds of decisions that cut across traditional organizational structures and force greater leader-centric behavior. The risks and stakes are higher, the change processes are usually accelerated, and more can go wrong. Six distinguishing features of BSCs include:

1. BSCs are the single most dramatic and unfamiliar change that an IHE or its leaders will face.

2. BSCs are unusually complex and entail a fundamental reconfiguring of the IHE formal organizational or corporate structure.

3. Consideration, negotiation, and go-forward decision-making in BSCs starts and ends with IHE leaders.

4. BSCs are inordinately more dangerous and riskier to IHE institutions and their leaders than typical change initiatives.

5. BSCs require a much faster pace of implementation than almost any other initiative faced by an IHE.

6. BSCs have a much narrower pathway to success than most other initiatives undertaken by IHEs.

Successfully managing BSCs for the betterment of the institution—and, most importantly, its current and past students—requires a particular type of leader and leadership that's not necessarily common across traditional higher education. BSC does not just call for familiar leadership qualities in greater proportion or greater intensity. Leadership behaviors specific to BSC are qualitatively different from otherwise successful and nurturing leadership in "normal" times. Qualities and skills that are sufficiently distinct from the daily functions of IHE leadership include:

1. Experience and comfort managing significant change, ambiguity, and uncertainty.

2. Providing operational all-inclusive envisioning.

3. Sensing and driving the pace of change: i.e., setting the drumbeat.

4. Building the right BSC-focused executive team.

5. Leading from the front: directly engaging.

6. Courage.

Myriad challenges will face BSC leaders, consistent with the complex and interdependent stakeholder networks of most IHEs. One of the most common challenges—facing and coping with opposition—is inevitable and requires some degree of protection for BSC leaders. The brief that follows provides a framework for this unique phenotype of leader, so critically needed by many institutions facing the unabating challenges of our times.

Introduction

> *"In this world you're either growing or your dying,*
> *so get in motion and grow."*
> —Lou Holtz, renowned football coach

Holtz captures the essence of how success is defined by most organizations. If growth is critical to organizational health and success, higher education personifies a sector under significant stress. The data and trends speak for themselves. Between 1957 and 2011, total university and college enrollment increased by 536%, from 3.3 million to 21 million, and the number of both public and private institutions of higher education (IHEs) grew rapidly. But beginning in 2011, higher education started to change. Over the next 10 years (2011–2020), total enrollment across the nation decreased by 11%, or a loss of 2.3 million students (see Figure 1).

Between 2013 and 2021, 97% of all IHEs experienced a decline in student enrollment. However, a small group of 104 schools (3%), mostly those with enrollments greater than 30,000, reported an average increase of 19%. Smaller institutions with enrollments under 1,000 experienced the most catastrophic declines (averaging 35%) (see Figure 2).

Figure 1. University and college enrollment: 1957–2021
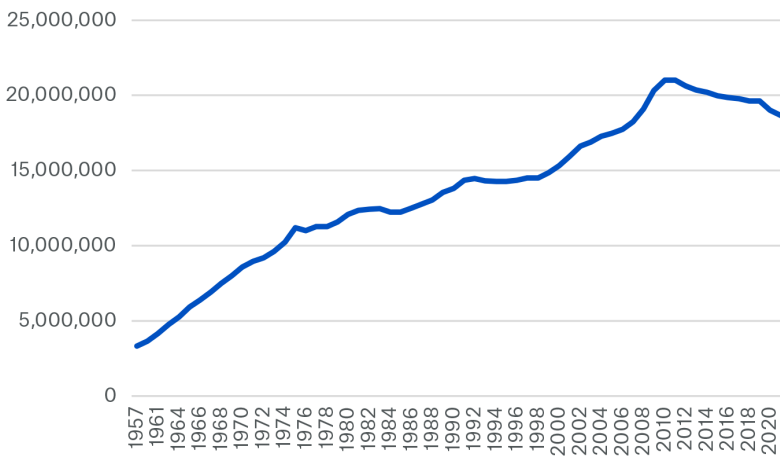
Data source: Table 303.10. Total fall enrollment in degree-granting postsecondary institutions, by attendance status, sex of student, and control of institution: Selected years, 1947 through 2031. Digest of Education Statistics. National Center for Education Statistics, U.S. Department of Education, Washington, DC (https://nces.ed.gov/programs/digest/d22/tables/dt22_303.10.asp; accessed 3/23/23).

Figure 2. Change in higher education enrollment by institution size

Colleges/universities by enrollment size
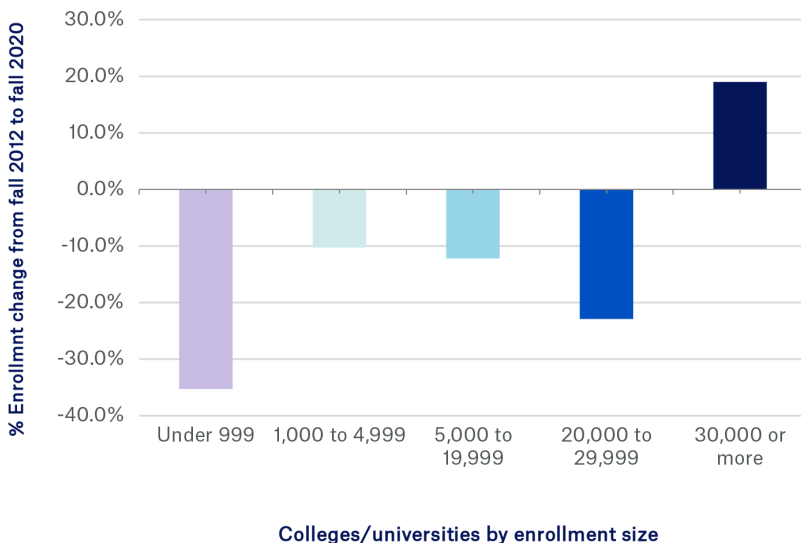
Data source: NCES Digest. Table 317.40, 2013-2020. (https://nces.ed.gov/programs/digest/d21/tables/dt21_317.40.asp, accessed 3-15-23).

The question is, will this trend continue and how should it impact how IHEs plan for their future? Opinions vary, but a number of different studies point toward this trend continuing, and worsening, for the foreseeable future. Full analysis of what's driving enrollment declines is beyond the purview of this brief—but, generally, declines are attributed to changing demographics, the increasing cost of higher education, evolving employer and student needs and expectations, the growth of very large institutions, and changing educational and business models.

Further, public confidence in higher education's ability to lead America in a positive direction has also declined in recent years.[1] A New America survey of Americans age 18 and older found that in 2020, 69% agreed that colleges have a positive effect on the economy.[2] By 2022, however, this affirmation had declined to 55%. Another survey by the *Wall Street Journal* and NORC of the University of Chicago noted that a majority of respondents did not think a college degree was worth the cost.[3] In essence, Americans are losing faith in higher education.

Alternatives to traditional higher education are flourishing. Edge Research and HCM Strategists, with the support of the Bill and Melinda Gates Foundation, conducted a study that included 11 focus groups and an online survey of 1,675 high school graduates, 18 to 30 years of age, who had decided not to go to college or had dropped out of a two- or four-year college program.[4] Almost half (47%) of those surveyed had taken or are currently taking classes via YouTube, and roughly a quarter were enrolled in courses to receive a license (25%) or a verified certificate (22%). Traditional classroom-based higher education remains important, but it is no longer the dominant education and training delivery model. Beyond the statistics, it appears clear tangible changes are occurring in how students are pursuing knowledge development following high school.

Given that the primary source of revenue for most IHEs flows from tuition and subsidies based on student enrollment, the operational and financial challenges created by such significant and rapid losses in student volume are self-evident. For a substantial portion of the 97% of IHEs that have experienced a decline in enrollment, significant action is required to ensure they remain viable, valuable, and competitive. For some IHEs, the changes might require straightforward adjustments regarding staffing, curtailing new program development, eliminating acquisition of new equipment or facilities, and so forth. Others may need to completely rethink how they have traditionally operated. Their leaders also may have to consider significant institutional restructuring that could impact the institution's corporate structure, autonomy, management, governance, name, affiliations, and even its heritage.[5] In this setting, institutional restructuring refers to the reorganization of the ownership structure of an institution, including via mergers,[6] corporate conversions (e.g., for-profit to nonprofit or vice versa), and closures. This level of change, restructuring, and realignment—usually expected to occur at an accelerated pace—is what we label "Big Scary Change" (BSC).

Why IHE leaders should understand and tackle BSC is increasingly evident: to grow, to diversify, and—in many cases—to survive. It is no longer feasible for the majority of IHEs to depend solely on organic growth in enrollment to fuel the financial engine that powers their operations. The time to act is when the organization is still viable and can offer tangible benefits to prospective partners should that be the best option forward.

What is required to facilitate a successful BSC?

Numerous issues affect the success or failure of major institutional restructuring. Every situation is unique, shaped by the age of the organization, the tenure of the executive team, market location and demographics, current and historical financial performance, and much more. While their

1   Karin Fischer. "Americans' Confidence in Higher Ed Drops Sharply." *Chronicle of Higher Education*, July 26, 2022. https://www.chronicle.com/article/americans-confidence-in-higher-ed-drops-sharply?sra=true&cid=gen_sign_in.

2   Rachel Fishman, Sophie Nguyen, and Louisa Woodhouse. "Varying Degrees 2022: New America's Sixth Annual Survey on Higher Education." New America, July 26, 2022. https://www.newamerica.org/education-policy/reports/varying-degrees-2022/.

3   Douglas Belkin. "Americans Are Losing Faith in College Education, WSJ-NORC Poll Finds." *Wall Street Journal*. March 31, 2023. https://www.wsj.com/articles/americans-are-losing-faith-in-college-education-wsj-norc-poll-finds-3a836ce1.

4   Edge Research and HCM Strategists. "Where Are the Students? New Research into College Enrollment Declines." Bill & Melinda Gates Foundation. September 28, 2022. https://usprogram.gatesfoundation.org/news-and-insights/articles/gates-foundation-probes-college-enrollment-decline.

5   All IHEs are corporate entities, although few are for-profit. A corporation is an organization formed with state governmental approval to act as an artificial person to carry on business (or other activities), which can sue or be sued, and (unless it is nonprofit) can issue shares of stock to raise funds with which to start a business or increase its capital. https://dictionary.law.com/Default.aspx?selected=358#:~:text=corporation,business%20or%20increase%20its%20capital.

6   Consolidations and acquisitions are mergers, so termed depending on messaging and perspective.

order of importance can vary depending upon conditions on the ground, our prior research on institutional mergers suggests that seven elements foster successful institutional restructuring[7] (see Box 1).[8] The balance of this brief provides a detailed look at how IHE leaders are embracing BSC to bring about fundamental, complex, and often irreversible changes to help their institutions face an increasingly turbulent future.

Box 1. Seven essentials for successful institutional restructuring, or Big Scary Change

Leadership
1. A committed and understanding governing body.
2. The right leadership.

Communications
3. A compelling unifying vision.
4. An appropriate sense of urgency.
5. A robust and redundant communication plan.

Process
6. A strong project management system.
7. Sufficient dedicated resources.

Managing BSC: Why is a different kind of leadership called for?

The many challenges of higher education today are formidable, but at the same time they provoke at least two questions: First, is this panoply of issues really more severe in degree and kind than the issues faced at other points in our history? We assert that the demands are sufficiently different and greater, and that a different kind of higher ed leadership is called for to meet them.

Only then can we ask the second question of higher ed leadership today, namely: "In what ways is leading BSC different from guiding the usual change and "transformation" undertaken on many campuses?"

Leading BSC in higher education is quite different from usual change initiatives (and also somewhat different from mergers and acquisitions in other industries—although there are many lessons to be learned from those transactions). BSC implies major changes in the corporate and institutional structure of an IHE, with new and different kinds of decisions that cut across traditional organizational structures and force greater

leader-centric behavior. The risks and stakes are higher, the change processes are usually accelerated, and more can go wrong. Box 2 lists six distinguishing features of BSCs:

Box 2. Big Scary Change: Definers, drivers, and correlates

- BSCs are the single most dramatic and unfamiliar change that an IHE or its leaders will face.
- BSCs are unusually complex and entail a fundamental reconfiguring of the IHE formal organizational or corporate structure.
- Consideration, negotiation, and go-forward decision-making in BSCs starts and ends with IHE leaders.
- BSCs are inordinately more dangerous and riskier to IHE leaders and institutions than typical change initiatives.
- BSCs require a much faster pace of implementation than almost any other initiative faced by an IHE.
- BSCs have a much narrower pathway to success than most other initiatives undertaken by IHEs.

- **BSCs are the single most dramatic and unfamiliar change that an IHE or its leaders will face.** Most leaders in IHEs have undertaken what they often call change and even some tout as "transformation." These may include expansions in the number of students served, development of new programs, changes in curriculum and academic offerings, and development of new units, such as centers and institutes. However, these usually imply changes or new initiatives within the current governance structure of the institution, but not fundamental changes to the corporate structure itself.

7   Ricardo Azziz, Guilbert C. Hentschke, Lloyd A. Jacobs, and Bonita C. Jacobs. *Strategic Mergers in Higher Education*. Johns Hopkins University Press: Baltimore, 2019. 99.

8   In addition, and perhaps the most significant factor negatively impacting how organizations evolve, is fear or hesitation to embrace the challenge of a BSC. All too often, IHE leaders continue to discount evolving conditions. This unwillingness to recognize new realities causes delays, which result in significant desired change coming too little and too late.

What makes these particular challenges so unusual is that they are rare, complex, and consequential.[9] This means relatively few, if any, members of a senior IHE management team have personal experience with the complex decisions associated with BSCs, which are generally more consequential than those associated with annual budgeting, capital campaigns, wholesale cost-saving initiatives, goal setting, and "routine" innovations of new programs and services. Typically, IHEs benefit from the shared experience associated with these traditional decisions and processes. Not so for mergers and other major corporate restructurings.

- **BSCs are unusually complex and entail a fundamental reconfiguring of the IHE formal organizational or governance structure.** Traditional bundles of decisions *flow through* the organizational structure of an IHE. BSCs, on the other hand, often result in the formal and *fundamental reorganization* of an IHE's governance and decision-making structure. The tactics and types of decisions that BSCs demand differ from what IHE stakeholders usually engage in, let alone decide upon.[10] BSCs are introduced from the top of the organization into a campus with very little direct experience in such decisions and outcomes. Conflating BSCs with changes flowing through the existing organizational structure will leave governing boards, leaders, and staff woefully unprepared for successfully managing the needed restructuring.

- **Consideration, negotiation, and go-forward decision-making in BSCs starts and ends with IHE leaders.** The majority of change in IHEs occur as a joint initiative of senior management and faculty and staff through shared governance processes. Much consultation and discussion are undertaken, committees are appointed, and transparent decision-making is embraced. Alternatively, when undertaking a BSC, shared governance must yield to centralization of decision-making because the stakes are higher, and relevant institutional experience and expertise are not widely distributed or even in existence.[11] In fact, the decision to undertake a BSC is the sole purview of the governing board, which is ultimately responsible for the IHE. Consideration, negotiation, and decision-making starts and ends with institutional leaders, and should be pursued with the highest degree of confidentiality. We note, however, that the *decision* phase of a BSC differs markedly from its *execution* and *implementation* phase, at which point all stakeholders should be engaged.

- **BSCs are inordinately more dangerous and riskier to IHE leaders and institutions than typical change initiatives.** Whenever an IHE chief executive elects to take

on and execute a bundle of decisions that fundamentally and irreversibly alter the institution for all stakeholders, the executive and their decisions become entwined—for better or worse.[12]

Not only is the IHE affected by BSC, but so too is the reputation of the IHE's chief executive. Even suggesting a BSC (such as a merger) will immediately elicit a strong stakeholder reaction. While many may view the proposal favorably, invariably a significant number will oppose it. Opponents may aim to slow the process down and, in the end, kill it. They often understand that the most effective way to derail a BSC is to eliminate the leader perceived to be driving the initiative. Hence, attacks on the chief executive can quickly become personal.

Not surprisingly then, BSCs tend to be inordinately "reputation making" or "reputation breaking", where the downside is often more feared than the upside is valued. Every administrator with any experience leading a BSC has a vivid personal memory of at least one set of decisions that did not go well and, with the benefit of hindsight, would have been pursued differently.[13] New, big decisions that do not go well (and even those that do) define the chief executive and their IHE for a long time. However, while the risks of undertaking BSCs are great, so too is succumbing to the temptation to not act at all.

9 Olaf Bach. "How to Manage Complexity through Organizational Structure." Management Kits. November 6, 2019. https://managementkits.com/blog/2019/11/6/manage-complexity-through-organizational-structure.

10 Reed Deshler. "Solving Organizational Complexity: Keep it Simple & Strategic." AlignOrg Solutions. February 12, 2019. https://alignorg.com/solving-organizational-complexity-keep-simple-strategic/.

11 Linda Brimm. "How to Embrace Complex Change." *Harvard Business Review*, September 2015. https://hbr.org/2015/09/how-to-embrace-complex-change.

12 Robert S. Kaplan, Herman B. Leonard, and Anette Mikes. "The Risks You Can't Foresee: What to Do When There's No Playbook." *Harvard Business Review*. November–December 2020. https://hbr.org/2020/11/the-risks-you-cant-foresee.

13 Bill Coletti. "How Can Universities Handle Reputational Risk Better?" Kith. https://kith.co/blog/universities-handle-reputational-risk-better/.

- **BSCs require a much faster pace of implementation than almost any other initiative faced by an IHE**. Higher education normally embraces incrementalism and consensus as preferred avenues for decision-making, often for good reasons. But the rare, fundamental, top-down, and generally irreversible nature of the big, new decisions associated with BSCs creates an imperative to step up the usual pace of decision-making. Thus, while a governing board may take months or even years to consider BSCs, once a go-forward decision is made, successful implementation requires great speed.

  Slowness poses danger to the successful implementation of a BSC. The slower the process proceeds, the more likely it will be scuttled as opposition forces gain traction… because no matter the circumstances, in reality few want change. Well-meaning and not-so-well-meaning rumors spread, and a generalized fear of job loss or uncertainty grows. Consequently, leaders and their teams tasked with undertaking a BSC need to be prepared to implement change with great speed, a concept that is anathema to many IHE executives and their organizations.

- **BSCs have a much narrower pathway to success than most other initiatives undertaken by IHEs.** The differences between more traditional change and BSCs gang up to narrow the decision-making pathway to success. A great number of steps, executed in the right sequence and with the right degree of urgency, are required for successful implementation of BSC. That process is fraught with myriad ways BSCs can be slowed or derailed.

  The necessary actions associated with large bundles of complex and consequential decisions are intertwined, in that they have ripple effects throughout the IHE, impacting otherwise insulated, reasonably well understood, and self-contained operations.[14] Consider for example, the impacts of merging two colleges on the talent development plans and procedures (hiring, work assignment, review, promotion, and separation) of academic departments. For the average academic department, this "new" work explodes exponentially.

  We recognize that many IHE leaders would not willingly initiate, let alone manage, BSCs. And yet, they may not be able to avoid embracing a BSC as a strategic tactic. And while external consultants provide valuable advice and guidance, IHE leaders cannot outsource leadership. Hence, the question arises: "What competencies are most critical to managing BSCs?"

> The slower the process proceeds the more likely it will be scuttled as opposition forces gain traction…because no matter the circumstances, in reality few want change.

Six critical competencies for leading a BSC

Overall leadership competency has many subjective qualities. We know it when we see it, and it's not easily parsed or analyzed. However, we believe the several leadership competencies required for BSCs are sufficiently distinct from the usual daily functions of IHE leadership to warrant separate attention.

Many successful leaders work by instinct alone, sensing institutional needs accurately and fulfilling those needs almost unconsciously. That may suffice for more traditional change initiatives, but based on our collective experience, instinctive leadership is inadequate when leading major institutional restructuring.

Leadership behaviors specific to BSC are qualitatively different from successful and nurturing leadership in "normal" times. BSC does not call for just familiar leadership qualities in greater proportion or greater intensity. Rather, we describe six critical competencies that we believe help leaders successfully implement institutional restructuring or BSCs (see Figure 3).

14 Ibid.

Figure 3. Six critical competencies serve as the pillars for leading Big Scary Change (BSC) in higher education

SIX CRITICAL COMPETENCIES FOR LEADING BIG SCARY CHANGE

Experience & comfort managing change and uncertainty

Able to provide all-inclusive operational envisioning

Setting the drumbeat

Building the right BSC-focused team

Directly engaging and leading from the front

Courage

Competency 1—Experience and comfort managing significant change, ambiguity, and uncertainty

Initially it seems almost oxymoronic to extol the value of "experience" and "comfort" in the midst of significant change, heightened ambiguity, and uncertainty. Certainly "keep calm" is easier said than done. After all, "significant change" is the euphemistic cousin of BSC, and "heightened ambiguity and uncertainty" masks realities that things can, and sometimes do, go very wrong.

Experience and comfort managing significant change. Few IHE leaders are trained or have experience as change managers, especially BSCs. Comfort managing significant change is a rare quality among IHE leaders, not because they're lacking in some way, but because campus processes work to select individuals that will strive to ensure enterprise continuity, which often implies preserving the status quo. The explicit goal is "achieve greatness" while the implicit message is "don't rock the boat."

Additionally, IHE leaders are expected to be full-time cheerleaders for their institutions. Naturally, most individuals would prefer to be applauded for sharing good news and wins. However, in today's environment IHE leaders must be willing to face and communicate the truth about the challenges their institution is facing, while ensuring that a path forward is presented. Confront the brutal facts, yet never lose faith.[15] Fortunately, IHE leaders are increasingly accustomed to examining different hypothetical futures through stress testing—the practice of routinely looking for potential problems, borrowed from the financial services industry.[16]

This "what-if" practice increases experience and comfort in dealing with external threats if and when they do arrive.

Thriving in extreme uncertainty. Few individuals will thrive in uncertainty. However, leading a BSC requires exactly that—leading into an uncertain future, where all the data are not in, where only time will tell whether the effort will be a success and all intended goals were achieved. Many IHE leaders would like very much to know all the facts before undertaking any radical change in their institutions. Unfortunately, that is never possible, and especially when managing a BSC.

Being comfortable with radical change, embracing the ugly truth, and persevering through extreme uncertainty and ambiguity are critical to successfully leading a BSC. We note that BSC leaders do not decide to be calm; rather, they manage aggressively *to achieve* calm. The focus is on the doing, not the attitude. The key is to know when traditional solutions are no longer viable and extraordinary measures are required.[17]

15   Jim Collins. *Good to Great*. HarperCollins, 2001. 65.

16   Verne Sedlacek. "The Importance of Stress Testing in Higher Education." Trusteeship, 27:5 (2019). Association of Governing Boards of Universities and Colleges. https://agb.org/trusteeship-article/the-importance-of-stress-testing-in-higher-education/.

17   "Collaborative Leadership for Higher Education Business Model Vitality: Strategic Conversations for Small College and University Governing Boards and Administrative Leaders." AGB. 30. https://agb.org/wp-content/uploads/2023/02/Collaborative_Leadership_for_Higher_Education_Business_Model_Vitality-web.pdf.

> The focus is on the doing, not the attitude. The key is to know when traditional solutions are no longer viable and extraordinary measures are required.

Competency 2—Providing operational all–inclusive envisioning

Every leader, to be even minimally effective, must always provide some measure of vision.

> *"Good presidents define their vision on how the institution will realize its mission. Presidents do this best when even while looking to the future, their vision [also addresses] the institution's strengths, weaknesses, opportunities, and threats, and resources. Or to put it another way, the president's vision must resonate with the institution, be true to its values, and be clear-minded about its realities. Ultimately, of course, effective presidents inspire the larger campus community to believe that the direction they are advocating is the right one."* [18]

To successfully lead a BSC, leaders also must be able to articulate a vision with two features that are not typically called for in the usual course of business of an IHE. First, they must be able to provide what we term "operational envisioning", that is, a vision statement that actually describes how the future enterprise will operate. It is not sufficient to say, "We will merge to be greater." Instead, it is important to explain how that merger will operate, providing stakeholders with a relatively clear idea of how things will work. This type of vision was one the great qualities of our nation's founding fathers, who were able to clearly articulate how this nation would operate as a democracy, a system of governance that at the time was the only one in the world.

The vision also should be all-inclusive—no small task in an enterprise with limited resources and, frequently, competing factions.[19] The vision statement must answer everyone's questions, namely, "What's in it for me?" and "What will happen to me?" It must be as inclusive as possible, as even a small faction that feels left out of the vision can serve as the seed of rebellion, particularly in these times of instant social media messaging. To the extent possible, the vision should also be unifying, addressing questions such as "How will this future structure make us better together?" "How will it ensure that I am not losing at the expense of them winning?" And so on.

Development of the vision statement requires careful thought and should not be confused with the tagline or catchphrase of the initiative. Nonetheless, in formulating their vision, BSC leaders should openly recognize the uncertainty of the proposal and not make false promises. Finally, once a vision statement (and associated tagline) is developed, it must be communicated widely and through as many media as possible, ensuring that the five Cs of communication—clear, concise, consistent, compelling, and comprehensive—are met.[20] It is virtually impossible to overcommunicate.

> Once an operational, all–inclusive and unifying vision is developed it must be communicated widely, and through as many media as possible, ensuring that the five Cs of communication—clear, concise, consistent, compelling, and comprehensive—are met.
>
> It is virtually impossible to overcommunicate.

Competency 3—Sensing and driving the pace of change: setting the drumbeat

Successful implementation of BSCs requires a break with the incrementalist approach often pursued when undertaking change in higher education. Once the go-forward decision is made public, the window for successful implementation of a BSC (e.g., a merger) is narrow. Greater speed favors the outcome; alternatively, a lack of expediency is the enemy of success. Consequently, leaders driving and/or overseeing a BSC must set the pace, or drumbeat, for implementation themselves.

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18 Susan Resneck Pierce. *On Being Presidential: A Guide for College and University Leaders.* San Francisco, CA: Jossey-Bass, 2012. 63.

19 Whether we acknowledge it or not, all departments, institutes, and centers—and all faculty and staff—are always competing for a greater piece of the proverbial IHE pie.

20 *Strategic Mergers in Higher Education*, 104–106.

In doing so, leaders of BSCs must be clear about the major milestones and timeline for a successful BSC implementation, and fully understand the necessary sequence of such events. Leaders must also be somewhat flexible, modulating the pace as necessary, to maximize completion while minimizing team burnout. Finally, BSC leaders need to be aware that no matter how well they attempt to set the pace, it will often be "too fast" or "too slow" in the eyes of others.

Setting the pace of implementation is among the most important responsibilities for leading BSCs.[21] The leader should never allow a hiatus, and never wait for the next standing meeting of any constituent group. Among those leaders who experienced unsuccessful BSCs, a dawdling pace was invariably cited as a contributor to the failure. On the other hand, our interviews with leaders that carried out successful BSCs revealed that many believed the pace of change was nearly impossible.

Invariably, when implementing a BSC, a single locus of authority emerges.[22] Indeed, should this not occur organically, the board must establish one.[23] The locus of authority may be a board member, but usually it is the chief executive of the "acquiring" or "dominant" institution if the BSC entails a merger.[24] Not surprisingly, the determination of which institution is dominant in any transaction rarely requires formal discussion.

Additionally, to facilitate a rapid pace of implementation, certain patterns of institutional behavior may need to be altered. The board may wish to meet more frequently, its usual agenda may be altered, and additional open agenda time may be scheduled. If the IHE chief executive or another leader becomes the single locus of change authority,[25] the opportunity for that person to directly access the governing board or a higher authority on an "on call" basis must be established. A highly skilled and deeply committed project manager is imperative (see below).

> ## A BSC is more likely to succeed when an appropriate level of urgency prevails.

A BSC is more likely to succeed when an appropriate level of urgency prevails. Creating this sense of urgency among the university community without generating widespread panic depends on a deliberate and planned process, and a high degree of transparency and communication skills. The right degree of urgency should be created based on facts (aka the ugly truths) and not histrionics or exaggerations.

When communicating difficult facts, leaders must remember that, to the extent possible, they should aim to retain their stakeholders' trust. Although undertaking, or even considering, a BSC creates a new urgency for IHE stakeholders to review their past, the vision for the BSC must look to the future, including defining what the BSC will accomplish and how it can minimize risks and serve to create a stronger institution. As the authors of a recent article put it:

> It is the *responsibility* of a leader to decide either to accept the risk or to take action to address it. Unwillingness to understand and accept reasonable risk [of taking action] can encumber an institution with stifling delays and frustrating inaction—to say nothing of lost opportunity and a failure to deliver on institutional mission.[26]

Finally, criticism and opposition must be anticipated. Resistance and backlash, whether organized or chaotic, are the forces that most often derail BSCs.[27] Preemptive intervention with the media, the government, unions (if applicable), and the faculty senate are all appropriate, but great care must be taken to leave nothing "pending." No item related to the execution of the BSC should be considered as pending by anyone other than the single locus of change authority. Time is both the single most important ally and the greatest vulnerability in the execution of a BSC.

21　Martin G. Moore. "How to Make Great Decisions, Quickly." *Harvard Business Review*. March 22, 2022. https://hbr.org/2022/03/how-to-make-great-decisions-quickly.

22　Neil Kokemuller. "The Advantages of Centralized Organizational Structure." *Chron*. February 13, 2019. https://smallbusiness.chron.com/advantages-centralized-organizational-structure-21410.html.

23　LSA Global. "When Centralized Decision-Making Makes Sense." https://lsaglobal.com/blog/when-centralized-decision-making-makes-sense/.

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Competency 4—Building the right BSC–focused executive team

Building competent and high-functioning teams is the purview and responsibility of all leaders, including when undertaking a BSC. IHE leaders typically hire team members with extensive experience in the usual operations of IHEs; however, when creating a team of individuals to consider or undertake a BSC, IHE leaders need to consider other qualities as well.

In addition to being experts in their own field, BSC team members should possess the aforementioned qualities of comfort managing significant change, ambiguity, and uncertainty. Team members should also fully understand the BSC goal and demonstrate genuine commitment to the pursuit of the initiative. They should also possess an ability to communicate broadly, with a consistent message, one that is preferably identical across the enterprise. Ideally, BSC team members should be knowledgeable concerning campus culture and individual key stakeholders. Finally, BSC team members should be willing to shield the leader driving the BSC, and fully understand why this is necessary for the success of the initiative and, presumably, for the success of the IHE.

Building such a team is not easy. Using the current IHE executive team has advantages, including their familiarity with the enterprise, its operations, and its people. However, these individuals may be uncomfortable with change, particularly if it is rapid and radical. Some may also not believe that the BSC is the right tactic to pursue. Finally, they may resent the driver of the BSC for causing uncertainty in their own jobs or disruption on campus. Consequently, current team members may strive to undermine and slow the initiative, confidentially sharing that they do not support the initiative, that it will be bad for the institution and its members, and so forth. Misalignment of the affected executive team within the hierarchy of an organization has a multiplying effect across the institution.

Any degree of misalignment within the executive team creates real danger for the initiative and its leader. Figure 4 illustrates this effect (see next page). In the figure, we are assuming that there are four tiers of hierarchy (Tier 1 = chief executive), that each supervisor has four direct reports, and that if the immediate supervisor is aligned (in agreement and supportive with the initiative), then 75% of their direct reports are also aligned.[28] Conversely, if the immediate supervisor is

not aligned, only 25% of their direct reports are aligned with the initiative. We would then observe that even when all top (Tier 2) executive leaders are aligned (see Figure 4A), 37.5% of Tier 3 direct reports are misaligned. Alternatively, if even one of the Tier 2 executive leaders is not aligned (see Figure 4B), then 43.8% of Tier 3 direct reports are not aligned—and the proportion of misaligned direct reports grows further in lower tiers of the hierarchy. Executive leaders should always keep in mind that while disagreement of their direct reports with a proposed strategy may be stated openly, more often disagreement is more subtle and covert, particularly if the initiative is potentially existential, but already has the blessing of the board and the chief executive.

Generally, there are three approaches to building a BSC-focused executive team. The first is to appoint a BSC-focused executive from within current leadership, while deliberately finding ways to reduce their workload (although not attention) related to their current duties. This may entail transferring some of their responsibilities to other employees of the IHE or bringing in external personnel to assist in the interim. The second approach is to bring new hires into the executive team to focus on managing the BSC. This may entail elevating members of the IHE to BSC-focused positions on an interim basis, or bringing in external personnel to do the same. A combination of these approaches—i.e., engaging some members of the current executive team while bringing new individuals onboard—is another possibility.

28 Recent research suggests this assumption for the degree of alignment among direct reports with the strategic priorities of the organization might be overly optimistic. See Robert Werner, Henning Streubel, Deborah Lovich, and Joseph Halverson, "When Leaders Say They Are Aligned—But Aren't." Boston Consulting Group, December 8, 2021. https://www.bcg.com/publications/2021/when-leadership-say-they-are-aligned-but-company-leaders-are-not; Donald Sull, Charles Sull, and James Yoder. "No One Knows Your Strategy—Not Even Your Top Leaders." *MIT Sloan Management Review*, February 12, 2018. https://sloanreview.mit.edu/article/no-one-knows-your-strategy-not-even-your-top-leaders/; and David Witt, "Only 14% of Employees Understand Their Company's Strategy and Direction." Blanchard LeaderChat, May 12, 2012. https://leaderchat.org/2012/05/21/only-14-of-employees-understand-their-companys-strategy-and-direction/.

Figure 4. Misalignment of the affected executive team within the hierarchy of an organization has a multiplying effect across the institution

A

B
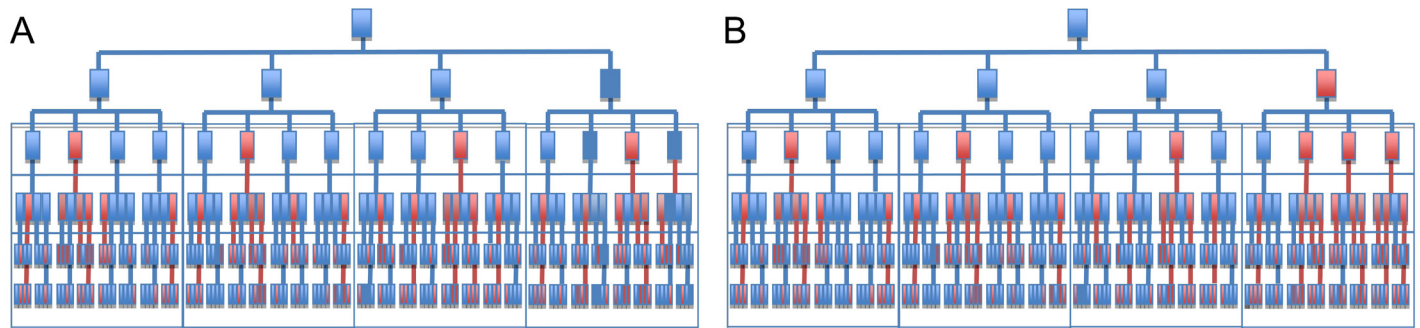
Note: This figure assumes four tiers of hierarchy, that each supervisor has four direct reports, and that if the immediate supervisor is aligned (in agreement and supportive with the initiative), then 75% of their direct reports are also aligned, while if the immediate supervisor is not aligned, only 25% of their direct reports are aligned with the initiative.

Source: Authors' illustration.

However the BSC-focused executive team is built, five caveats should be kept in mind (see Box 3). First, the chief executive (who often is also the single locus of authority) needs to be rigorous and fair in selecting BSC-focused executive team members. While they will be tempted to leverage who they already know, this may not always be in the best interest of the IHE.

> ## Box 3. Five caveats when building a BSC–focused executive team
>
> - Be rigorous and fair in selecting team members.
> - The executive team should continue to focus on managing the enterprise well.
> - Keep in mind that executives and their staff do not have unlimited attention and operational band-width.
> - Ensure the executive team is accomplishing the tasks that need to be completed, perhaps with the assistance of a chief transition officer.
> - While a BSC-focused executive team may be created, it is also critical that all stakeholders recognize that the BSC is everybody's responsibility.

Second, data suggests that successful BSCs (e.g., mergers) generally occur when the executive team is already managing the enterprise well.[29] Consequently, the executive team of an IHE undertaking a BSC should strive to continue to manage their institution as well or even better than before, while ensuring distractions are minimized.

Third, executives and their staff do not have unlimited attention and operational bandwidth. While bandwidth will vary from person to person, it is unreasonable and unwise to ask an executive to do their current job well and also manage the BSC well, no matter how tempting this may sound. Thus, it is likely that additional assistance will need to be brought to bear.

Fourth, the chief executive will need to ensure the executive team is fully completing all tasks and in the right sequence. But because their bandwidth is also limited, several institutions undergoing BSC have appointed a dedicated chief transition officer. If such a person is unavailable, a different individual should be assigned this function, to act as the right hand of the BSC leader.

Finally, while it is useful to appoint a BSC-focused executive team, it is also critical to communicate consistently and continuously to the broader campus community that the BSC is everybody's responsibility and not just that of a few.

29 Ricardo Azziz, Guilbert C. Hentschke, Bonita C. Jacobs, Lloyd A. Jacobs, and Haven Ladd. "Mergers in Higher Education: A Proactive Strategy to a Better Future?" TIAA Institute. New York, NY: TIAA Institute, 2017. https://www.tiaa.org/public/institute/publication/2017/mergers-higher-education.

Conceiving and planning BSC may happen in solitude, but execution will be public, requiring the effort of multiple teams and team members. Organization of the work of execution is critical, including the right people, the right assignments and expectations, and the right follow-up and reporting. Failure in any of these areas can spell BSC failure.

> ## Organizations have many components; success has many teams.

A BSC will almost always involve multiple functions and departments. Organizations have many components; success has many teams. Leaders of IHEs undertaking BSC, therefore, will need to simultaneously assign and manage multiple work teams. Simultaneous formation and assignments is important to set the pace of change, but also to demonstrate to the organization that BSC will impact many aspects of institutional life. Functionally, work teams in a BSC should be patterned after classic work redesign teams, but with far different expectations and methodologies. Project management is a mature science, much discussed in management literature,[30] and it will not be discussed further here except to note its value and indispensability.

Competency 5—Leading from the front: Directly engaging

BSCs call for the institution's chief executive (or other individual in charge of the BSC) to lead from the front, visibly and clearly. Most IHE chief executives do not anticipate a merger, consolidation, closing, or partnership in their institution's future. Nevertheless, when faced with the realization that they should consider or implement such options, presidents and other leaders within the institution must determine the best way to lead from the front.

There's no question that leading BSC is quite difficult, but if the administration leads from the front, listens to every concern, and is transparent and forthcoming, it can be a positive journey. Visibility and building trust are critical. Leaders must communicate well and be enthusiastic promoters throughout the process. Additionally, it is important for leaders to continue to build bridges and repair any that have been damaged. Leaders must maintain strong relationships with numerous groups, including their board(s), system leaders, faculty senate, staff council, student government, community leaders, alumni, and many others. Typically, there will be

key influencers who can be quite helpful with this work, and it is important that leadership communicates with them and responds to their concerns.

Competency 6—Courage

We have found that a healthy dose of courage distinguishes BSC leaders. It is perhaps the least appreciated yet most defining characteristic of successful BSC leaders. In many cases, we have seen that BSC leaders' behavior has been inordinately influenced by their personal sense of what is best for the organization, despite a lack of unequivocal supporting data or widespread support from close allies—and with absolute uncertainty about what is best for them and their career. Leaders who have successfully executed BSCs have been motivated as much by belief as by calculation. We use the word "courage" to reflect this competency, with clarification as follows.

First, is courage really a skill that can be acquired, rather than something more inherent in the nature and character of the individual? Or are there development strategies that would increase the odds of an IHE leader having courage? Either way, the notion of courage connotes many worthy actions, such as doing what's right and behaving according to one's convictions in spite of adverse circumstances. Often, courage reveals itself when one's convictions suggest behavior that may run counter to the circumstances at hand. Second, the impact of courage on others may be mixed. Many behaviors ascribed to courage by some can be seen by others as something less: for example, vision can be seen by some as dreaminess or having one's head in the clouds; bold, as foolhardy; perseverance, as bull-headed or stubborn; and equanimity for some can be insensitivity to others.

> Of the six competencies that set BSC leaders apart from other higher education leaders, courage is the most difficult to acquire if it is not already present.

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30 *Strategic Mergers in Higher Education*, 198.

Courage, in the BSC context, is distinguished from these less flattering and dysfunctional attributes in several ways. First, its influence on behavior is independent of the ultimate outcome of the decision. A leader can make a courageous decision, which in hindsight may have been either a good or bad decision. Second, courage, especially as reflected in decisions, is motivated more by internal values than by external circumstances. Changing external circumstances and information can lead to changing decisions, but personal values are enduring and do not change that easily or quickly. Third, courage entails an element of dealing with fear. Courageous decisions are riskier, inducing increased fear of undesired outcomes. Finally, so many BSCs require decisions in which the lives and fortunes of some individuals will be made worse (even while the lives of many others are intended to be made better). This "greater good" argument requires a willingness to resist making what may be a more popular decision in the short-term in favor of a harder, but better, decision for the long term.

Similar to the five competencies discussed above, courage (or the lack thereof) is reflected in the behavior of BSC leaders. Unlike the other competencies, however, courage is more closely embedded in the leader's enduring character and persona. Relative to most of us, courageous people seem to be more comfortable in their "inner space" and with their own vision of the worst-case scenario. Of the six competencies that set BSC leaders apart from other higher education leaders, courage is the most difficult to acquire if it is not already present.

Managing opposition and protecting the BSC leader

> ### Opposition to a BSC is inevitable—and should always be expected and prepared for.

Myriad challenges face BSC leaders, consistent with the complex and interdependent stakeholder networks of most IHEs. One of the most common challenges—facing and coping with opposition—is inevitable and requires some degree of protection for BSC leaders.

Managing opposition

Opposition to BSC is inevitable. The challenges associated with BSC can manifest themselves in all corners of the IHE: concerns from accrediting agencies on matters of "complex substantive change" and "change of control"; negative impacts on academic programming and student academic progress; overruns in departmental operating expenses; misleading public information messaging; faculty governance agendas; conditional alumni support; and frayed community relations. Challenges can include formal civil lawsuits from some,[31] and votes of no confidence from others.[32] More common flareups include disputes among stakeholders that, when publicly aired in the press, damage relationships and sow uncertainty. To make matters worse, these BSCs often involve battles located in more than one IHE.

All IHEs consistently face routine challenges. But BSC itself inevitably creates new, higher-level challenges to existing IHE governance and management structures. Further, BSC opposition does not confine itself to a single department, set of stakeholders, point in time, or even political issue. Opposition is multifaceted and multicausal, requiring a differentiated approach to successfully combat it.

Worthy versus problematic opposition. Not all opposition is bad. In fact, there will be stakeholders who oppose BSC because they believe that opposition is in the best interests of the IHE. In this case, opposition may be legitimate and helpful in the long run if it raises possible outcomes that should be ameliorated.[33] Worthy opponents should be embraced and engaged in BSC by senior management because their concerns can be directly recognized, even if not fully addressed. Alternatively, some opponents' beliefs are problematic, particularly when they are misguided and based on erroneous assumptions.

31 Coalition Letter to the University of Arkansas Trustees regarding the potential purchase of the University of Phoenix. Veterans Education Success. February 15, 2023. https://vetsedsuccess. org/coalition-letter-to-the-university-of-arkansas-trustees-regarding-the-potential-purchase-of-the-university-of-phoenix/.

32 Rob Jennings. "Professors File Complaint against N.J. College Preparing to Merge with Larger University." NJ.com. February 10, 2023. https://www.nj.com/education/2023/02/professors-file-complaint-against-nj-college-preparing-to-merge-with-larger-university.html.

33 Jennifer Porter. "How to Handle the Naysayer on Your Team." *Harvard Business Review*. March 30, 2016. https://hbr. org/2016/03/how-to-handle-the-naysayer-on-your-team.

One tactic for engaging opposition casts all individual stakeholders into one of three camps: those in favor of BSC, those opposed, and those who have not made up their mind one way or the other. The strategy should be to focus engagement on the uncommitted group, leveraging those who already support the initiative, more so than on the opposition group, because over time, growth among those who are clearly supportive is more likely to come from the uncommitted than from the opposed group.[34]

Managing multiflank opposition. Opposition is better managed when individual issues have multiple and specific counter arguments, as opposed to relying on a single, generalized counter argument.[35] For example, one source of BSC opposition could likely be fueled by fear and uncertainty surrounding potential job loss. This opposition will vary significantly depending on the category of employees in question. Responses to specific employment circumstances, even if not comprehensive, will help mitigate growth of more generalized opposition. Specifically, making known that all category X employees will retain their current positions post-transaction does not fully counter all opposition that stems from job uncertainty, but it is quite likely to reduce the opposition from category X employees.

Employment uncertainty is just one of many sources of BSC opposition; official responses should be marshalled to directly address each major source of opposition. There will be many counter arguments, but they should aggregate into one coherent and consistent narrative that "this BSC is *good* for this IHE". If this argument cannot be credibly created, then perhaps the BSC is not worth the cost.

Lack of speed is the enemy. The passage of time, during which nothing is interjected to counter opposition, fosters uncertainty and opposition. Periods of no discernable progress on the BSC are also problematic, as they foster rumors, conspiracy theories and overall uncertainty, where pessimistic futures trump optimistic ones. Further, delay erodes the credibility of the narrative that the BSC is a good thing for one or both IHEs involved. Alternatively, a steady, deliberate, widely understood timetable of upcoming announcements helps to direct attention toward a proactive BSC agenda.

Continuous board education and communication. Speed in the context of a BSC requires a different way to communicate among key governing bodies and stakeholders. Under normal times, regular communication is a given, but over the extended period of BSC, "regular" is not frequent enough. Events, planned and unplanned, will occur more rapidly; fact has to continuously combat rumor; and more deliberation and decision-making is required at the top of the IHE—including decisions arising from responses to BSC opposition.

Finding, developing, supporting, and shielding leaders of BSC

The IHE's governing board is the defining influence on leadership in times of BSC. Chief executive leadership is a function of who the board recruits, hires, nurtures, responds to, and transitions as its president.

Finding and developing the right leader. Historically, boards searched for chief executives from within the academic/administrative ranks of higher education. Candidates from this traditional pool are more familiar with current issues and trends in higher education, institutional culture(s), the effects of technology on teaching and learning, and the academic labor force, than "nontraditional" candidates.[36] Increasingly, though, boards are considering candidates with nontraditional backgrounds because they may be more outward-facing and more experienced in dealing with the challenges facing higher education today, e.g., economic pressures, digital disruption, and job complexity.[37] As for building the executive leadership team (per Competency 4 above), if a BSC is contemplated, recruiting a chief executive with the necessary skills and competencies is key. Governing boards should also realize that it is not sufficient to recruit an able chief executive, give them an encouraging pat on the back, and leave them to their own devices. Even the most experienced leader will require significant development and assistance, either because they have never managed a BSC of the magnitude or type contemplated, or because they are less familiar with the institution, particularly if they are an external appointment.

34 Mats Persson and Magnus Frostenson. "Support and Opposition in an Attempted Higher Education Merger." Tertiary Education Management, 2021; 27:59–72. https://doi.org/10.1007/s11233-021-09065-5.

35 Chris Hampton, Jenette Nagy, Eric Wadud, and Aimee Whitman. "Chapter 35: Section 1. Overview of Opposition Tactics: Recognizing the Ten D's," and "Section 2. How to Respond to Opposition Tactics." Community Tool Box. https://ctb.ku.edu/en/table-of-contents/advocacy/respond-to-counterattacks/respond-to-opposition/main.

36 Scott C. Beardsley. *Higher Calling: The Rise of Nontraditional Leaders in Academia*. University of Virginia Press: Charlottesville, VA, 2017.

37 Scott C. Beardsley. "Shaking up the Leadership Model in Higher Education." *McKinsey Quarterly*. February 2018. https://www.mckinsey.com/~/media/McKinsey/Business%20Functions/Strategy%20and%20Corporate%20Finance/Our%20Insights/Shaking%20up%20the%20leadership%20model%20in%20higher%20education/Shaking-up-the-leadership-model-in-higher-education.pdf.

Beyond selection, air cover. The trope often repeated by IHE governing board members is that they have but one task: to hire/fire the president. This is misleading, especially when IHEs and their boards confront BSCs. When an IHE faces unusually large, potentially existential, challenges—*between* the "hire" and the "fire"—a successful board will shield the chief executive long enough for that person to get through any tough period, turn things around, or move an initiative far enough along for it to be able to stand on its own.[38] It is critically important to protect and support the leader as they lead others. The board's "cover" extends *through* the leader's tenure and should include an exit plan. Creating a presidential exit strategy (e.g., to an endowed professorship with research funding after a year's sabbatical), provides a valuable extra measure of personal certainty within the uncertain BSC environment.

Box 4. The art of self-preservation

- Be transparent.
- Ensure trust.
- Nurture and develop direct reports.
- Ensure an appropriate exit strategy— negotiated in advance.
- Develop the right narrative.

The art of self-preservation. Supporting the president falls largely on the governing board's shoulders, but it is also in the interests of the BSC leader to help make sure that they themselves have sufficient "air cover",[39] especially from their board (see Box 4). Apart from board support, presidential self-preservation is tied to two qualities mentioned previously: ensuring transparency and trust between the chief executive and the board, and the nurturing and development of the president's direct reports.[40] The art of self-preservation also lies in ensuring an appropriate exit strategy—negotiated in advance—should events not proceed as planned.

Finally, self-preservation also requires developing the right narrative. Leaders of BSCs often are blamed if they fail, or even if they are successful. That is the nature of the job. However, leaders will be best served if, in addition to fully grasping the reasons driving the BSC, they also fully understand that most of the events the BSC entails are not within their span of control. This understanding should not minimize leaders' level of engagement in the BSC, but it can inform development of a cogent and truthful narrative around this reality.

Conclusion

The excess capacity of U.S. higher education, combined with declining enrollment, devaluation of higher education, and the projected enrollment cliff will continue to put financial pressure on a majority of IHEs—particularly smaller institutions—for decades to come. Strategies that may allow, in some manner, continuation of the mission, heritage, and identity of many institutions include finding strategic partners and considering institutional restructuring (e.g., mergers). We call such initiatives Big Scary Change (BSC).

BSC is among the single most dramatic and unfamiliar initiative that an IHE and its leaders will face. Successfully undertaking such change requires leadership skills and qualities that are not the norm in traditional higher education. BSC calls for not just familiar leadership qualities in greater proportion or intensity; rather, BSC demands leadership behaviors that are qualitatively different from otherwise successful and nurturing leadership in "normal" times. It behooves governing boards, executive leaders, and policymakers to fully grasp the need to consider and potentially pursue BSC in the face of the mounting challenges to higher education and IHEs in our nation. They must also select and train leaders for the skills and qualities needed to lead BSC, while providing protection and support in the face of inevitable, and often passionate and ardent, opposition.

Further discussion of the needed leadership skills and qualities to consider and manage BSC, and how to develop these, will be reviewed in future publications.[41]

38 Leigh Perkins. "Choosing the Right Leadership Styles in Management." January 17, 2023. https://corporatetraining.usf.edu/blog/choosing-the-right-leadership-styles-in-management.

39 Guillaume Hervé. "5 Elements for Leaders to Provide Effective Air Cover." LinkedIn. April 26, 2015. https://www.linkedin.com/pulse/5-elements-leaders-provide-effective-air-cover-guillaume-herv%C3%A9/.

40 Lolly Daskal. "7 Easy Ways to support your Leader." lollydaskal.com. https://www.lollydaskal.com/leadership/7-easy-ways-to-support-your-leader/.

41 Ricardo Azziz, Guilbert C. Hentschke, Lloyd A. Jacobs, and Bonita C. Jacobs. *Leading Mergers and Institutional Restructuring in Higher Education*. John Hopkins University Press, Baltimore, MD (forthcoming, fall 2024).

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Bonita C. Jacobs took office as the president of North Georgia College & State University in 2011, becoming the university's first female president and only the second woman to lead one of the country's six Senior Military Colleges. Jacobs oversaw the successful consolidation between North Georgia College & State University and Gainesville State College to become the University of North Georgia in 2013, serving as founding president until 2023. Prior to that, Jacobs was Vice President for Student Development and a tenured Professor of Counseling and Higher Education at the University of North Texas, and was the founder and first executive director of the National Institute for the Study of Transfer Students. Jacobs has received multiple awards for leadership in higher education and student development. She is former editor of *The Journal of College Orientation and Transition* and served on three additional editorial boards. Jacobs is co-author of *Strategic Mergers in Higher Education* (JHU Press, 2019), and numerous book chapters and journal articles.

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