



Next Gen Penn State Advisory Group Report

June 2021

More than 14,000 voices were heard through Next Gen Penn State

On behalf of the Board of Trustees, thank you to the members of the Next Gen Penn State Advisory Group for actively soliciting input and participation from your constituency groups to help inform the selection of Penn State's 19th president.

In addition to your outreach, we were able to reach an astonishing number of community members for their input through:

- A series of virtual discussions with Spencer Stuart;
- Feedback on the nextgenpsu.edu website;
- Comments and nominations sent to a dedicated email address PennStPresident@SpencerStuart.com; and,
- Responses to our online Next Gen Penn State survey.

The major themes we heard were well aligned across all modes of input and are outlined on the following pages. Both the website and Spencer Stuart email mailbox will be left open should you or members of your constituency group have additional comments or nominations.

We look forward to your feedback on the major themes and input into the final report to be submitted to the Presidential Recruitment and Selection Committee. Thank you again for your time, energy, and commitment to this important work/process.



David Kleppinger

Next Gen Penn State Advisory Group

- **Francis Achampong**, Chancellor of Penn State Mont Alto
- **Kathleen Bieschke**, Vice Provost for Faculty Affairs
- **Squire Booker**, Evan Pugh Professor of Chemistry and of Biochemistry and Molecular Biology
- **Richard Bundy**, Vice President for Development and Alumni Relations
- **Bryan Culler**, Student Trustee
- **Mark H. Dambly**, Trustee (Co-Chair of the Presidential Selection and Recruitment Committee)
- **Daniel Delligatti**, Trustee
- **Valerie Detwiler**, Trustee
- **Michele Duffy**, Assistant Teaching Professor of Kinesiology
- **Jacqueline Edmondson**, Chancellor of Penn State Greater Allegheny
- **Robert Fenza**, Trustee
- **Ronald Filippelli**, State College Borough Mayor
- **James Franklin**, Head Football Coach
- **Mary Frecker**, Riess Chair of Engineering
- **Shaun Gabbidon**, Distinguished Professor of Criminal Justice at Penn State Harrisburg
- **David Gray**, Senior Vice President Emeritus for Finance and Business/Treasurer
- **Frank Guadagnino**, Vice President for Administration (executive support)
- **Laura Guay**, Undergraduate Student
- **Laura Guertin**, Professor of Earth and Mineral Sciences
- **David Han**, Trustee and Vice Chair for Educational Affairs, Department of Surgery
- **Madlyn Hanes**, Senior Vice President for Commonwealth Campuses/Executive Chancellor
- **Marie Hardin**, Dean of the Bellisario College of Communications
- **Shannon Harvey**, Director of the Office of the Board of Trustees/Associate Secretary (executive support)
- **Dr. Darrell Kirch**, Former Dean of the Penn State College of Medicine and CEO of Penn State Milton S. Hershey Medical Center
- **David Kleppinger**, Vice Chair of the Board of Trustees (Advisory Group Chair)
- **Clarence Lang**, Dean of the College of the Liberal Arts
- **Lawrence Lokman**, Vice President for Strategic Communications
- **John Mason**, Chancellor of Penn State Harrisburg
- **Keith E. Masser**, Former Trustee (Penn State Health representative)
- **Stephen Massini**, Chief Executive Officer of Penn State Health
- **Zack Moore**, Vice President for Government and Community Relations
- **Bhargava Motupalli**, Undergraduate Student (President of the Penn State Harrisburg Student Government Association)
- **Noe Ortega**, Trustee
- **Alice Pope**, Trustee
- **Julie Anna Potts**, Trustee (Co-Chair of the Presidential Selection and Recruitment Committee)
- **Tracy Riegel**, Penn State Alumni Association Alumni Council Executive Board
- **Rick Roush**, Dean of the College of Agricultural Sciences
- **Matthew Schuyler**, Chair of the Board of Trustees
- **Damon Sims**, Vice President for Student Affairs
- **William Sitzabee**, Vice President of Facilities Management and Planning/Chief Facilities Officer
- **Richard Sokolov**, Chair of “A Greater Penn State for 21st Century Excellence” fundraising campaign (donor representative)
- **Bonj Szczygiel**, Associate Professor of Landscape Architecture and Women’s Studies (Chair-Elect of University Faculty Senate)
- **Nico Terry**, Graduate Student
- **James B. Thomas**, Mount Nittany Health Board Member
- **Steven Wagman**, Trustee
- **Sean Walsh**, Undergraduate Student
- **Craig Weidemann**, Retired Vice President for Outreach and Vice Provost for Online Education
- **Lora Weiss**, Senior Vice President for Research
- **Marcus Whitehurst**, Vice Provost for Educational Equity

Next Gen Penn State Outreach

By the numbers

SMALL GROUP MEETINGS WITH UNIVERSITY GROUPS

- **36** virtual stakeholder input sessions conducted by the Spencer Stuart team
- **276** individuals participated across a range of constituency groups including the Board of Trustees, President's Council, Council of Chancellors, Council of Academic Deans, Senate Leadership, Senate Standing Committee Chairs, Senate Council, Staff Advisory Council, Student Leader's Roundtable, Alumni Council Executive Board, President's Commissions for Equity, which includes the Commission on Lesbian, Gay, Bisexual, Transgender, and Queer Equity; the Commission on Racial/Ethnic Diversity (CORED); and the Commission for Women
- **57** candidate nominations captured in the stakeholder sessions

NEXT GEN PENN STATE SURVEY AND WEBSITE

- Penn State community members across every campus location invited to access the website and participate in the survey
- Survey link accessible to **157,225** students, faculty, staff and **429,148** alumni as well as other community stakeholders
- Received **14,243** survey responses between April 12-30
- Received **305** responses via Penn State website
- Received **1,764** candidate nominations via the survey



Questions asked stakeholders via interviews, survey, and Next Gen Penn State website

Key Questions	Method of Inquiry
What is most distinctive about Penn State? What words describe Penn State's most distinctive characteristics?	Stakeholder interviews Survey
What are the challenges facing the university over the next 3-5 years?	Stakeholder interviews Survey
What are the opportunities for the university over the next 3-5 years?	Stakeholder interviews Survey
What are the key priorities for Penn State's next President?	NGPS Website
What are the qualifications, experience, and qualities of the ideal candidate?	NGPS Website
What are the critical skills and leadership capabilities needed for Penn State's next President?	Stakeholder interviews Survey

Penn State has many distinctive attributes
on which to build.

The combination of these distinctive attributes is powerful.

Access

Penn State's commitment to access is reflected in its broad palette of teaching and learning opportunities through a flexible and contemporary framework that supports student access.

Collaboration

Educators, researchers, staff and students work seamlessly across a vibrant, complex, and unique campus network of significant scale. This network binds and leverages a highly engaged community.

Land grant mission

There is tremendous commitment to, and pride in, fulfilling Penn State's land grant mission which has enormous impact to the citizens of the Commonwealth and serves as an economic driver of the communities they serve.

One Penn State

Penn State's 24 geographically distributed campus network structure is distinctive from other institutions and provides access for a vast range of students across the state, resulting in a diverse community of faculty, staff, and students. In addition to on-campus stakeholders, the network is critically important to surrounding communities.

Interdisciplinary research and academics

A real standout for the university, Penn State has received the highest rating for research universities. Recognized internationally, the interdisciplinary nature of Penn State's research and curriculum is culturally embedded and fosters a richer academic experience and new research discoveries.

Shared governance

Penn State's rich history of faculty and administration working together consistently and productively, is evidenced by engrained governance structures, such as the Faculty Senate.

Strength of alumni

Penn State's enormous and committed alumni base has the largest dues paying Alumni Association in the world. A key strength of the university, there is exceptional alumni support for students as mentors and career advisors, enthusiastic engagement in the athletic programs, and robust philanthropy resulting in three successive fundraising campaigns in excess of \$1 billion.

World Campus

At the forefront of virtual delivery of a college degree program, World Campus increases access and is widely recognized as a model within higher education.

Honors College

Penn State's highly ranked honors program is globally recognized for excellence and a national leader in honors education.

Innovation hubs

The hubs enable entrepreneurial thinking that aim to generate ideas to spur and accelerate economic development in the region and local communities.

There is an enormous sense of pride and community in Penn State's unique identity.



Words/themes used more than 250 times in the Next Gen Penn State survey.

Looking ahead, while there are challenges facing our university and higher education, there is a strong sense of opportunity for Penn State.

Opportunities and innovation emerge from challenges.

CHALLENGES

Resources and funding	With state funding static, like other institutions in higher education, Penn State will need to identify alternate sources of revenue and manage costs to support its aspirations and infrastructure needs.
Changing demographics	Facing higher competition for shrinking pool of students, faculty and staff.
Diversity, equity & inclusion	Fostering diversity and ensuring a welcoming and supportive environment across the University in all its forms.
Affordability	Maintaining a level of sustainable tuition and costs of attendance while investing in growth and innovation.
Education & student experience	Increasing focus on student needs and the student experience in which creativity is furthered in both on-campus and on-line experiences.
Brand/identity and reputation	Increasing awareness of Penn State's academic strengths, research excellence, and robust community to draw additional attention to the university's distinctiveness and potential.
Internal processes and structure	Accelerating the pace of change and decision-making to increase nimbleness.
Scope and scale of multi-campus structure	Fully appreciating the scope and scale of the University's distinctive multi-campus structure. Each campus expands the University's reach and connections; their individual and collective potential is vast and should be leveraged.



OPPORTUNITIES

Capitalize on research strength & elevate funding	Already a significant asset, expand interdisciplinary research, potentially in areas aligned with Penn State's mission – health sciences, biotechnology, agriculture and other disciplines – to spur economic development and revenue growth.
Evolve land grant mission	Build on the foundation of the land grant mission to address changing student demographics; leverage the network of campuses to advance with and in their communities and drive economic growth. There is opportunity for significant further outreach across the network.
Advance DE&I efforts	Continue to expand efforts to support equity, racial justice, and diversity to build a culture of inclusion for students, faculty and staff.
Improve affordability	Within the land grant mission, enhance access for citizens of the Commonwealth to attend the university and demonstrate the value and outcomes of a Penn State education for the dollars spent.
Innovate in education & student experience	Foster innovation and ways of teaching that enhance the student experience, prepare students for life and work, and enable access to education and learning over their lifetimes.
Differentiate brand	Create competitive advantage by building on Penn State's rich tradition as a proud, loyal, supportive community committed to excellence in all areas while furthering the highest values of integrity and service.
Innovate ways of working	Explore and embrace change in areas such as technology, service orientation, communications and decision-making to increase organizational agility.
Leverage scale for increased impact	Given its scale, diversity of programs, 24-campus structure and geographic reach, Penn State has the platform and opportunity for greater impact on the landscape of higher education and the citizens it serves, more than any other institution.

There was relatively high consistency across major stakeholder groups in the key challenges and opportunities.

Top 3 survey responses by stakeholder group in alpha order (full supporting survey data begins on slide 14)

	Alumni	Faculty	Staff	Students
Challenges	<ul style="list-style-type: none"> Advance reputation and profile Financial sustainability Sustainable tuition 	<ul style="list-style-type: none"> Diversity, Equity & Inclusion Entrenched campus culture Financial sustainability 	<ul style="list-style-type: none"> Diversity, Equity & Inclusion Financial sustainability Sustainable tuition 	<ul style="list-style-type: none"> Advancing reputation and profile Diversity, Equity & Inclusion Sustainable tuition
Opportunities	<ul style="list-style-type: none"> Drive innovation in teaching and education delivery Enhance student experience Strengthen research profile 	<ul style="list-style-type: none"> Improve internal processes Promote DE&I Strengthen research profile 	<ul style="list-style-type: none"> Improve internal processes Promote DE&I Strengthen financial sustainability 	<ul style="list-style-type: none"> Drive innovation in teaching and education delivery Enhance student experience Promote DE&I

These opportunities help shape the ideal set of experiences and leadership attributes needed in Penn State's next President.

Ideal presidential criteria



PENN STATE PRESIDENT

Career Experience

- Demonstrated leadership of a complex enterprise
- Academic leadership experience and/or deep understanding and appreciation of scholarly and academic values
- Demonstrated commitment to Diversity, Equity & Inclusion
- Stewardship of a breadth of assets and a demonstrated record of making sound financial decisions and judgment on behalf of an organization or institution
- Complex stakeholder engagement – internally and externally
- Transformational/change leadership
- Track record and commitment to student success

Leadership Capabilities

- Strategic thinking and entrepreneurial vision
- Empowering leadership that results in strong teams
- Collaboration and influencing
- A sense of accountability and responsibility
- Values-driven

Personal/Professional Attributes

- Integrity/authenticity
- Transparent and effective communications
- Builds trust/confidence
- Appreciation for shared governance
- Capacity for decision making
- Empathy and humility
- Inspirational

Appendix: Next Gen Penn State Survey Results

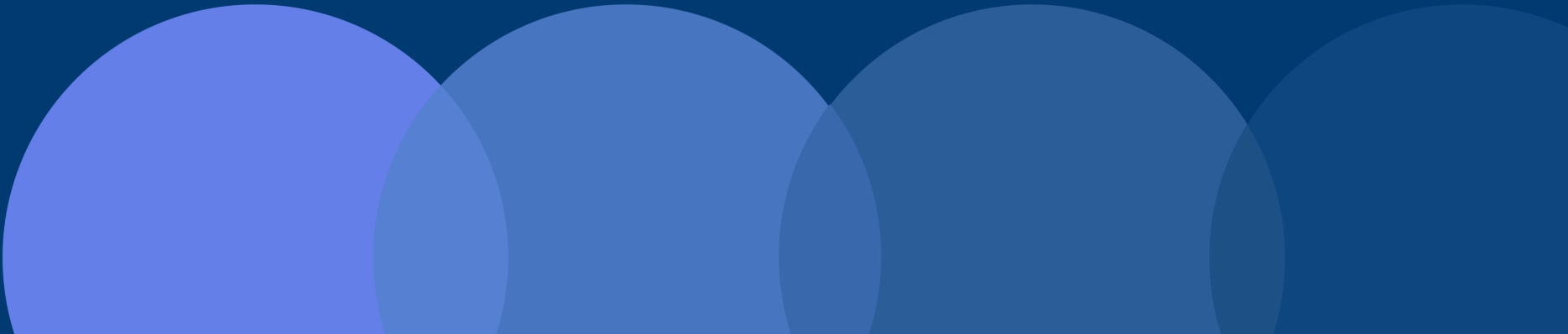
(Note: the following pages include survey data only. They do not include input from the Next Gen Penn State website comment form or feedback from stakeholder meetings.)

University President Search Survey Results Briefing

Contents:

- Survey Background
- Executive Summary
- Key Findings—President Search
- Key Findings—Institutional Context

Survey Results



Survey Administration and Participation Counts

Survey Administration Window

- Survey open: April 13, 2021
- Survey close: April 30, 2021

Affiliation with Penn State	Response Count
Alumni	6,594
Staff	3,248
Student	2,081
Faculty	1,845
Other Affiliation Groups	475
• Parent/guardian of current or former student(s)	251
• Donor	96
• Community Member	49
• Board Member (not from Board survey link)	45
• Volunteer	27
• Board Member (from Board survey link)	7
Overall	14,243

Search Survey Best Practices



Directional guidance: The results from this survey should provide *directional* guidance about the characteristics to look for in the next President of the University.



Themes are key: Each stakeholder group has a different perspective and plays a unique role in this process. The key themes are derived from the top priorities of each stakeholder group.



Additional information: The results from this survey are being used in addition to the information gleaned from one-on-one interviews and small group discussions. The survey is one piece of the larger data collection process.

Executive Summary

Executive Summary—Overall

What makes Penn State unique:

- Pride, community, and excellence

Challenges and opportunities for the next President:

- Themes of diversity, equity & inclusion, student focus, and financial stability
 - The top four challenges are related to sustainable tuition, financial stability, advancing Penn State’s reputation, and concerns about diversity, equity & inclusion
 - The top four opportunities are related to promoting diversity, equity & inclusion, driving innovation, enhancing the student experience, and strengthening the University’s research profile

Capabilities, experience and attributes of the next President:

- Themes of strong leadership ability, character/integrity, and experience in academia
 - Most important capabilities include strategic thinking, leading people and being values driven
 - Most important experience include enabling student success, creating organization vision, and complex academic leadership
 - Most important attributes include deep integrity, effective communication, building trust, and making difficult decisions

University Emphasis

- Strong agreement that appropriate emphasis is being given to academics and research, but low agreement* that appropriate emphasis is being given to diversity, equity & inclusion, community relations, the Arts, and fulfilling the Land Grant mission

* Low agreement implies only that the current amount of emphasis is not perceived as appropriate and might be too high or too low.

Key Findings: President Search

Unique Brand

What two words would you use to describe Penn State's most distinctive characteristic as a higher education institution? (words/themes used more than 250 times)

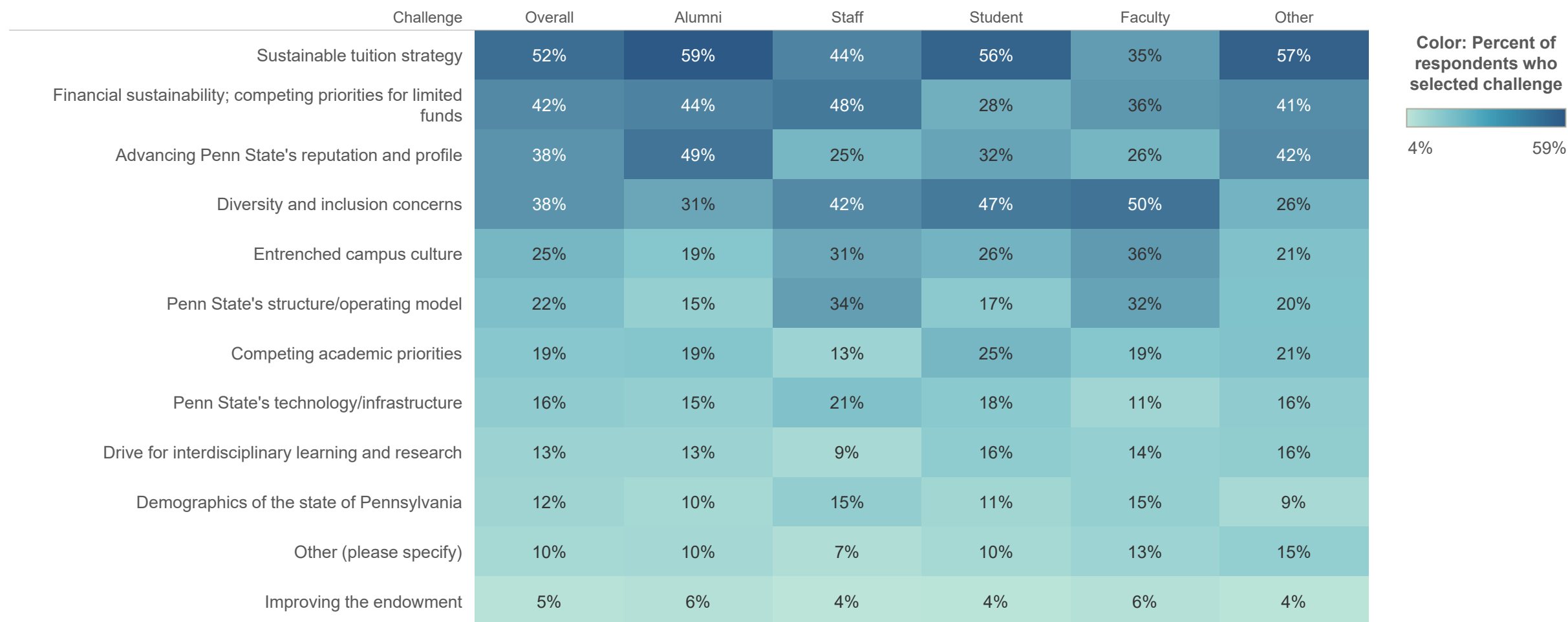
Color: Number of times word/theme was used



Word/Theme	Overall	Alumni	Staff	Student	Faculty	Other
Pride/Proud	1,501	757	348	255	94	47
Community	1,405	535	319	373	134	44
Tradition	867	505	231	51	50	30
Excellence/Excellent	866	492	181	39	129	25
Research	849	263	284	83	208	11
Education	599	363	128	47	44	17
Loyal	586	382	105	26	52	21
Family	573	334	107	83	26	23
Quality	569	354	80	35	68	32
Large	560	182	155	99	103	21
Academics	515	311	68	52	68	16
Football	499	212	128	78	72	9
Diverse/Diversity	424	150	121	104	39	10
Big	410	119	89	80	110	12
Integrity	405	217	104	37	40	7
Innovative	392	141	133	50	62	6
Honor/Honorable	390	277	69	24	6	14
Leader	327	154	107	19	34	13
Inclusive	320	123	86	73	32	6
Respected	314	171	74	30	30	9
Opportunity	305	150	46	62	30	17
Prestigious	277	117	80	49	21	10

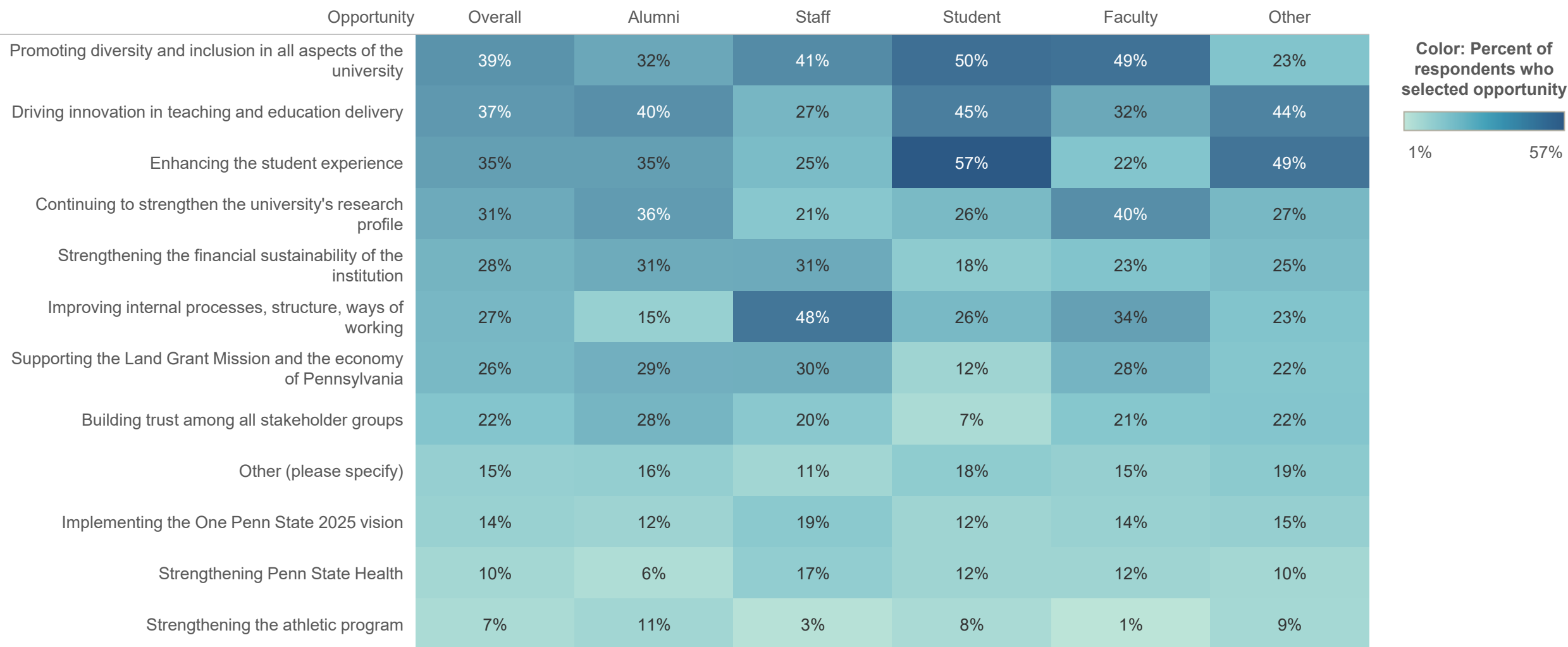
Challenges

What are the top three challenges for the next President of Penn State during their first three years?
(% of respondents who selected challenge)



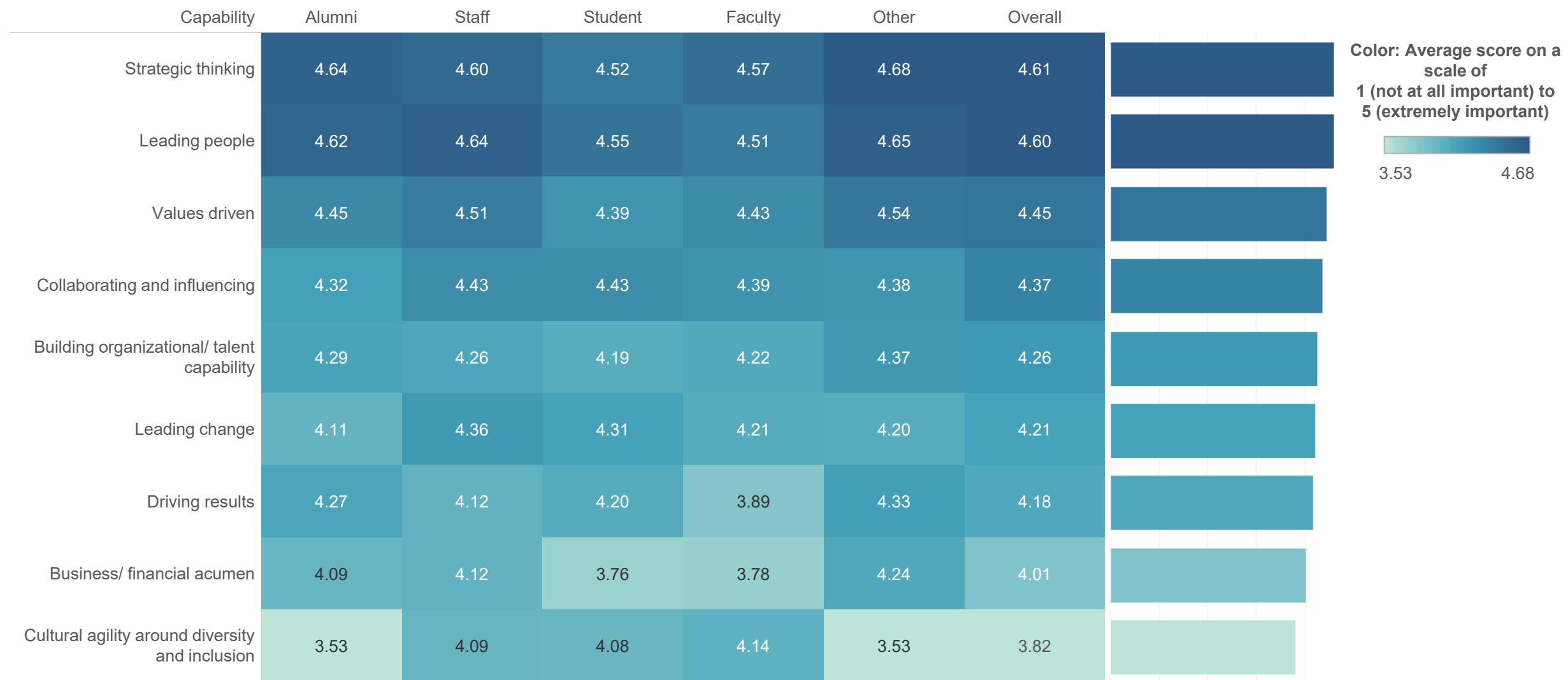
Opportunities

What are the top three opportunities for the next President of Penn State during their first three years in the position? (% of respondents who selected opportunity)



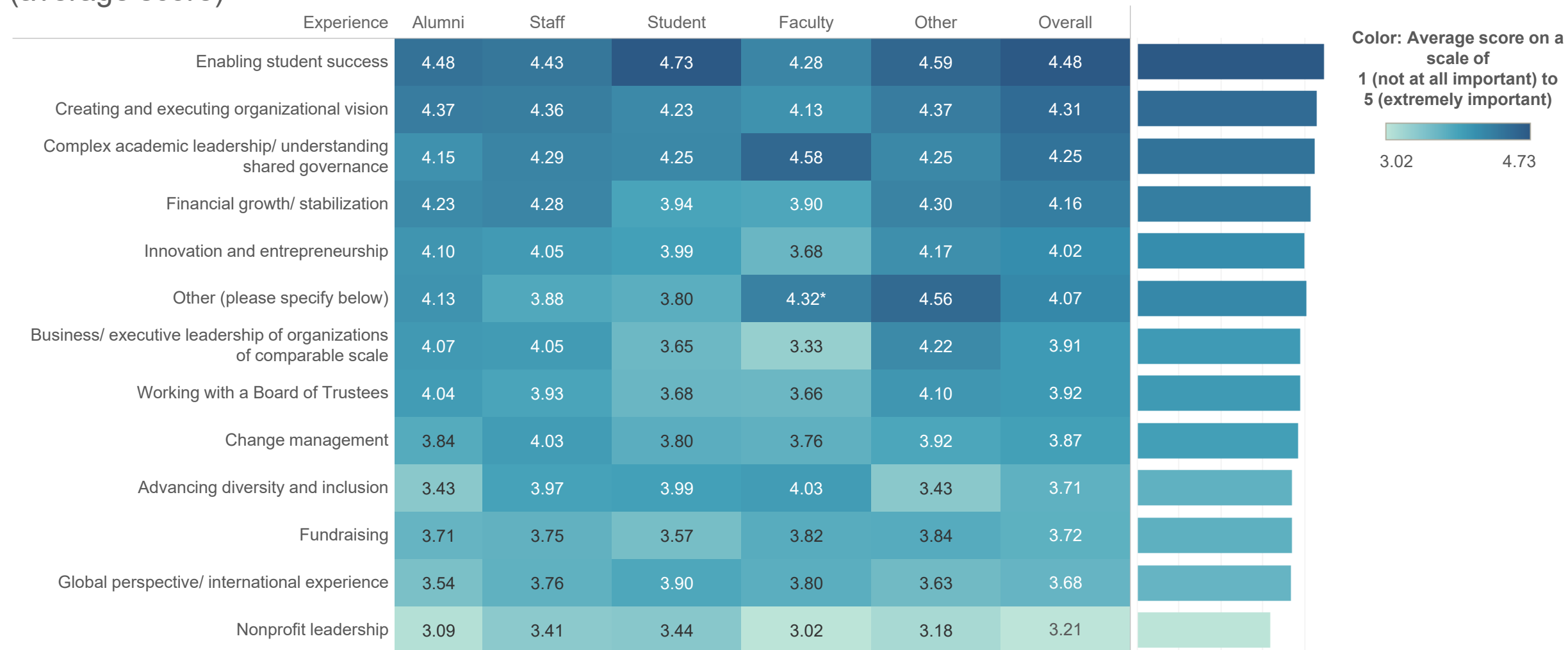
Leadership Capabilities

How important are the following leadership capabilities for the next President of Penn State? (average score)



Career Experience

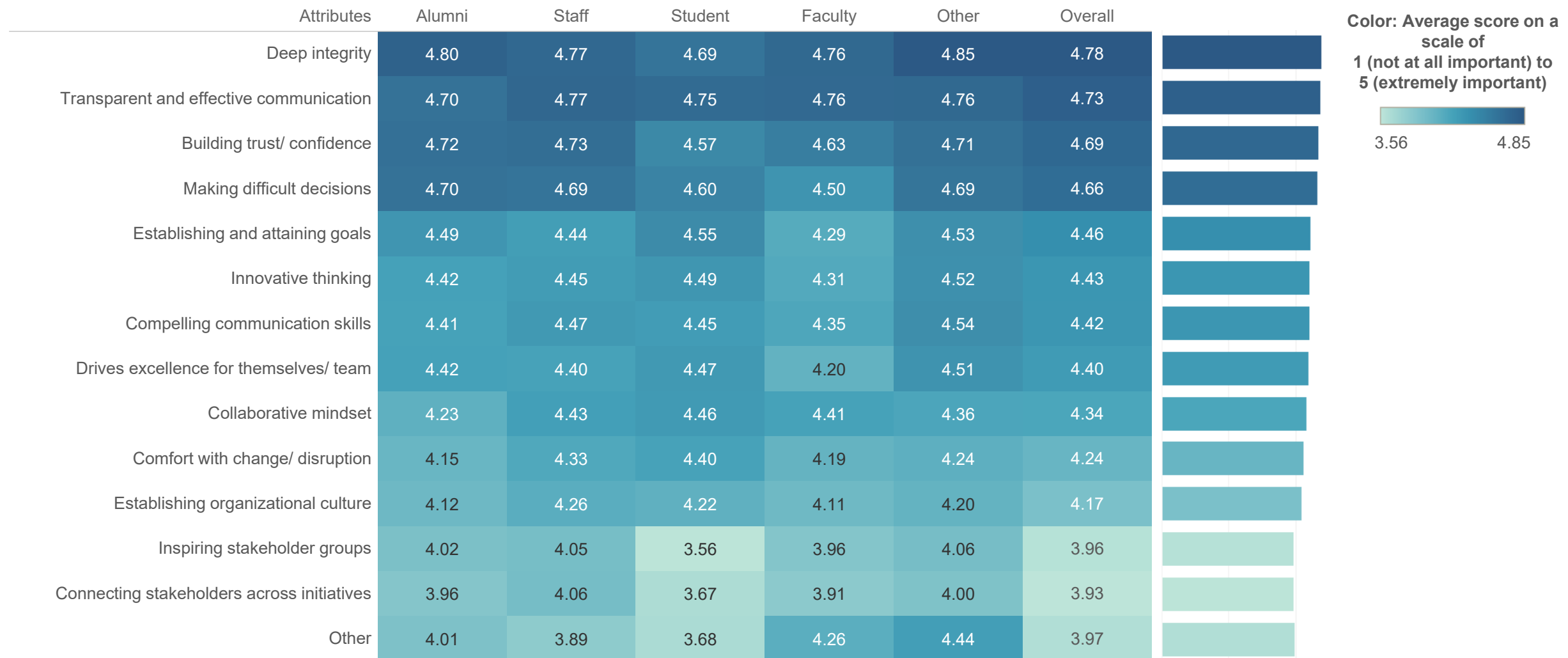
How important are each of the following types of career experience for the next President of Penn State?
(average score)



*Academic, faculty and research experience were most cited in the “other” comments

Professional Attributes

How important are each of the following types of executive experiences and professional attributes for the next President of Penn State? (average score)



Key Findings: Institutional Context*

**Institutional context questions allow us to understand how stakeholders feel about specific areas where the president has significant influence.*

University Emphasis

Penn State places appropriate emphasis on the following attributes (% agree)

Low agreement implies only that the current amount of emphasis is not perceived as appropriate and might be too high or too low.

