



## POSITION DESCRIPTION

FOR THE POSITION OF  
PRESIDENT



**O G L E T H O R P E**  
U N I V E R S I T Y

OCTOBER 2019

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## POSITION DESCRIPTION

<b>POSITION</b>	President
<b>ORGANIZATION</b>	Oglethorpe University
<b>LOCATION</b>	Atlanta, Georgia
<b>WEBSITE</b>	<a href="http://www.Oglethorpe.edu">www.Oglethorpe.edu</a>



**“Nescit Cedere: He who does not know how to give up.” –Oglethorpe University Motto**



## OVERVIEW: OGLETHORPE UNIVERSITY PRESIDENT SEARCH

Oglethorpe University (OU), a close-knit, student-centered, private liberal arts college in Atlanta, GA, seeks in its 17th President a dynamic, strategic, and transformational leader to ensure a future of smart and sustainable growth, innovation, and positive social impact. Following the enormously successful 15-year tenure of outgoing President Larry Schall, this is a unique and opportune moment to assume leadership of an institution with a remarkable trajectory.

In addition to galvanizing the OU community around a distinctive course for the University's future – vis-à-vis the architecture of a new strategic plan – the President will be charged with attracting broad philanthropic support, forging new partnerships in the region, growing enrollment, improving student success, and furthering OU's commitment to educating and preparing a diverse student body.

Founded in 1835, Oglethorpe is a national liberal arts and sciences university named for James Edward Oglethorpe, the founder of the colony of Georgia. The campus – listed on the National Register of Historic Places – is modeled after General Oglethorpe's *alma mater*, Corpus Christi College, Oxford, and features distinctive, granite Gothic buildings on 100 acres of wooded property. Atlanta is a cultural and economic powerhouse; the school's location offers all members of OU's community the ability to connect with, and benefit from, the city's cultural, international, corporate, and athletic opportunities, enhancing the University's curriculum and campus lifestyle.

At OU, faculty and staff take great pride in developing the whole student, on a first name basis; bridging classroom theory and real-world experience through internships, career development, study abroad, civic engagement and undergraduate research. With an operating budget of \$30M, the University offers its 1,385 students more than 60 areas of study including its business program which, through the generosity of alumnus Bill Hammack, has been newly established as the Q. William Hammack School of Business. The advent of the business school is the latest success in a dramatic period of growth for Oglethorpe that has also witnessed the grand opening of the award-winning Turner Lynch Campus Center, the new I.W. "Ike" Cousins Center for Science and Innovation, a new residential apartment complex with state-of-the-art classrooms, the establishment of five global programs, the founding of an experiential learning incubator known as the Atlanta Laboratory for Learning (A\_LAB), and an expansion of its arts programs.

Oglethorpe's next President will partner with a committed and resourceful Board of Trustees, expert and dedicated faculty, adroit administrators and staff, inspired students, and active alumni, in the work of guiding the University toward sustained excellence. The successful candidate will bring a keen sense of the future of higher education and, specifically, small, tuition-dependent colleges. The President will be an inspiring team builder, powerful communicator and fundraiser, collaborative problem-solver, champion of inclusion, and sound fiscal manager. Candidates should offer a distinguished record of senior leadership experience and professional achievement in higher education or an equivalent level of responsibility in a business, government, or nonprofit enterprise. A sophisticated sense of the uniqueness of liberal arts colleges and the ability to articulate their enduring value are essential. The President will be expected to champion OU's mission and serve as its persuasive and dynamic ambassador locally, regionally, and nationally. A terminal degree is preferred but not required.

Oglethorpe University has retained Diversified Search to assist in this recruitment. Confidential inquiries, nominations, referrals, and expressions of interest (cover letter, CV, and the names of five references) should be directed to the search firm as indicated on page nine of this document.



## ROLE SUMMARY

The President is Oglethorpe University's chief executive officer as well as its leading spokesperson, fundraiser, and advocate. The President will cultivate and nurture an environment that attracts and supports the highest quality, highest performing, highest potential, and most diverse students, faculty, and staff. The President will promote a culture that fosters safety, respect, communication, transparency, equity, and inclusion as well as innovation, teamwork, efficiency, and professionalism across the institution. While providing clear, strong leadership to the senior team (see organizational chart), the President makes and supports prudent financial and managerial decisions that ensure the fiscal strength of the institution. Oglethorpe's President also leads, and actively participates in, the securing of private philanthropic support. Reporting to the university's Board of Trustees, the President provides vision and strategic leadership to the university, pursuant to carrying out the University's policies.

The President is expected to be an engaged leader in promoting – throughout the community of Brookhaven, the city of Atlanta, the State of Georgia and the community of higher education, nationally and internationally – Oglethorpe and the values of a liberal arts education. Such audiences include alumni; donors; elected officials; state, federal, and international agencies; professional and educational associations; and the public at large. The President works collaboratively with other university presidents, elected and appointed officials, education and business leaders to advance the goals of higher education and the interests of Oglethorpe University.

## OPPORTUNITIES AND CHALLENGES

In carrying out these responsibilities, the President has tremendous assets to draw upon. These include:

- ◆ A conservative balance sheet, and a healthy financial outlook driven by increased enrollment and a decade of fiscal prudence;
- ◆ Committed faculty who are excellent teachers;
- ◆ A strong Core curriculum that students describe as “transformative”;
- ◆ A natural tendency towards interdisciplinarity;
- ◆ An extraordinarily diverse population of students who appreciate one another's uniqueness;
- ◆ A relaxed and familial campus culture without much bureaucracy;
- ◆ A beautiful campus that is cared for meticulously;
- ◆ A growing reputation within the City of Atlanta (a cultural and economic powerhouse); and
- ◆ A great deal of positive momentum and the perception that the future is filled with possibility.

With this enviable foundation, the President will provide leadership on the following key issues:

- ▼ ***Developing the next strategic plan*** – Oglethorpe's last strategic plan was approved by the Board of Trustees in 2010. It addressed the engagement between high quality classroom learning and real-world application in the City of Atlanta and beyond. The new President will have the opportunity to launch a new strategic plan addressing key questions with which the university must grapple, such as:

- Determining the “right size” of enrollment and strategy for growth and capacity building, taking into account the current tuition discount rate and the potential investment in services and personnel required to responsibly support a growing student body;
- Developing strategies to improve student success (particularly retention and graduation rates) and to animate the student experience through a range of experiential opportunities and high-impact practices that enhance students’ intellectual, cultural, social, and professional development;
- Strengthening Oglethorpe’s model and practice of shared governance to ensure healthy decision-making for the university;
- Continuing Oglethorpe on a sustainable course of financial success while strategically investing in human capital and innovative offerings;
- Unleashing the entrepreneurial energy of the new Hammack School of Business and ensuring its alignment with the overall university plan; and
- Continuing investment in the physical plant guided by an updated campus master plan, and the modernization of information technology resources and capability.

The new plan will need to be aspirational, and the planning process inclusive of all audiences, particularly faculty.

- ▼ ***Championing the University and its aspirations – in Brookhaven and Atlanta, within the state of Georgia and the greater region, and across the country*** – Ambitious cities require ambitious universities. Oglethorpe University’s next President will need to be a consummate bridge-builder, strengthening and expanding connections to community organizations and the business and professional communities to address employer needs and, in turn, seek their advocacy. The President will inspire an expansive and growing network of entities (local, regional, and beyond) to join with Oglethorpe University as partners and to invest generously and purposefully in its future.
- ▼ ***Overseeing Oglethorpe University’s next capital campaign, extending the reach of advancement, and inspiring greater alumni giving and participation*** – Achieving the goals of the next strategic plan will require the new President to launch Oglethorpe’s next comprehensive campaign and to motivate alumni to engage as key contributors to its success. Alumni giving at Oglethorpe has been modest, generally registering around 10 percent in annual participation. The opportunity to galvanize the philanthropic energy of alumni is tremendous and congruent with the appointment of a new President with an exciting vision. The President will articulate Oglethorpe’s stories of student, alumni, and faculty impact while putting in place the infrastructure (with professional and volunteer leadership) to ensure a well-organized, efficient, and engaged campaign process. The president will apply a keen eye toward assessing the efficiency and reach of the current fundraising infrastructure and deciding where to make careful investments in capacity building – to ensure modern research and technology capabilities are leveraged.

- ▼ ***Building on a proven, high-achieving leadership team*** – The next President will join an exceptionally strong leadership team of capable professionals who are comfortable working in a high-expectation, results-oriented environment. As a leader, the President will ensure that all university functions are achieving at the highest level and that team members work collaboratively with one another in support of OU’s mission. The President will define measurable objectives, and motivate a culture of accountability that serves the University’s best interests. The President will establish clear lines of delegation and expectation, and empower members of the cabinet to make challenging and informed decisions appropriate to their responsibilities and to communicate their decisions in a timely, transparent, and thoughtful manner.
  
- ▼ ***Strengthening the faculty and enhance the pedagogical offerings of the University*** – The health of the academic enterprise depends upon the continued strength of the faculty and the creation of an intellectual environment that promotes outstanding research and scholarship, quality instruction, innovation, creativity, and inclusive excellence. Championing the humanities, social sciences, and natural sciences while driving innovation within Science, Technology, Engineering, and Mathematics (STEM) and business fields, the President will foster an appreciation of diverse intellectual traditions at Oglethorpe while also encouraging collaboration across academic departments, the creation of cross-disciplinary programs, and the development of academic initiatives that are responsive to the manifold changes awaiting OU students in industry and global leadership.
  
- ▼ ***Forging a culture of shared enterprise*** – Oglethorpe’s ability to weather the financial stresses and demographic changes that have adversely affected so many small liberal arts institutions is a reflection of a commitment to shared enterprise during a time of scarcity, if not austerity. The loyal faculty and staff have served the university with great dedication, but minimal resources. The new President has the opportunity to re-frame this picture – both with careful investments of resources and with the cultivation of a standard of excellence, responsiveness, and transparency in all affairs of the University. Equally important, through inclusive processes and practices, the President will elicit the development of a shared vocabulary to convey a unified view of Oglethorpe’s strengths, the work that remains to be done, and each unit’s collective role in realizing an ambitious future.

Addressing these challenges will require a resourceful leader, sophisticated in managing the dynamics of a complex organization, deeply committed to the mission and character of Oglethorpe, and able to inspire and marshal the energies of all its stakeholders in the interests of creating a shared future for the university.

## REQUIRED QUALIFICATIONS AND EXPERIENCE



### POSITION DESCRIPTION

OGLETHORPE UNIVERSITY | PRESIDENT

PREPARED BY LIONEL ANDERSON, KEVIN KELLY, and KIM M. MORRISON, PH.D.

Oglethorpe University seeks an exceptional leader with the vision, leadership qualities, and energy to inspire all of the members of the University community. The Search Committee understands that no single candidate will have all of the ideal qualifications but seeks candidates with the following experience and abilities:

- ***A Global Perspective:*** Appreciation of the importance of teaching students how to value and thrive in cultures other than their own combined with an understanding of how to integrate a global perspective into the work of an educational institution.
- ***A Proven Commitment to Diversity and Inclusion:*** A broad experience with diverse cultures and communities, and the proven capacity to embrace diversity in all aspects, including the savvy to recruit, welcome, retain, and build an integrated, inclusive, and diverse community where everyone at Oglethorpe enjoys a strong sense of belonging.
- ***A Proven Leader and Visionary:*** A record of imaginative and verifiable success that will inspire and earn the confidence of all University constituents; and the proven capacity to weave a compelling and authentic narrative out of the University's unique history. The ability to anticipate and plan for the University's future needs and ambitions, the commitment to fortify and, in some cases, create the requisite infrastructure and systems essential therein, and the persistence to lead with courage, through and beyond, the realization of Oglethorpe's many aspirations.
- ***Passion for a liberal arts education and the values it offers:*** Such is the mission of Oglethorpe University; the passion should already be burning within its next President. Commitment to the mission does not preclude an assessment of, and challenges to, the manner in which the institution provides this education, but it does require the President to be thoughtful in preserving an OU ethos that privileges the liberal arts, believes in its power to create dynamic learners, and positions its students to pursue all avenues of graduate study and professional endeavor.
- ***Professional Distinction and Intellectual Leadership:*** Experience in a senior level position in academia, industry, non-profit, or the civic and government sectors; a demonstrated commitment to exceptional scholarly inquiry; proven ability to recruit outstanding faculty; an abiding regard for research and teaching; and the capacity to build scholarly programs of significant scale and impact.
- ***A History of Successful Fundraising:*** The capacity to represent Oglethorpe compellingly to donors and a track record of meeting ambitious philanthropic goals; the ability to ignite support among alumni, young and old, and champion the University.
- ***Business Acumen:*** In addition to fundraising, the President will possess other skills essential to managing an enterprise, such as strategic financial planning; sound budgeting; the development of achievable business plans; analysis and generation of innovative revenue streams; and prudent expense control.
- ***An Experienced Manager:*** A demonstrated administrative capacity and ability to develop, inspire, and lead a team capable of managing a multifaceted institution whose recent initiatives and advances have created stresses of many kinds; and also, the capacity to think strategically, with others, in a manner that transcends the vexing concerns of the moment. A leader who will collaboratively design and implement an institutional transformation. A leader who possesses working knowledge of SACSCOC principles.

- **Public Presence and Communication Skills:** The President will be an extremely articulate, persuasive, and sought after writer and speaker, a force for intellectual and professional community building, and possess the charisma and eloquence to excite and inspire listeners in any setting.
- **Leadership Style:** Gifted in her or his ability to energize faculty, students, staff, parents, alumni, trustees, and external stakeholders, and to persuade audiences locally, nationally, and internationally to believe in Oglethorpe’s future; a collaborative, inclusive, and transparent leadership style with a willingness to consult, listen, praise, and admonish; an effective negotiator, practiced in the arts of conflict resolution and ombudsmanship; maintaining the highest standards of ethics and integrity.
- **Personal Style:** The President will be enthused by the opportunities and challenges that present themselves at Oglethorpe; move easily and with an amiable manner in a wide variety of social milieus; and be comfortable with the extensive travel necessary to meet the challenges at hand. Within the Oglethorpe community, the President will be approachable to students, parents, alumni, faculty, and staff and demonstrate genuine interest in their impressions and experience of the University. The President will have an appreciation for University engagement with its local community and must be a person of integrity who will act at all times in the best interests of those he or she represents.
- **Dedication to the Institution’s Mission:** A deep personal commitment to teaching, research, and learning, and an affinity for students.

## APPLICATIONS, NOMINATIONS, AND INQUIRIES

Oglethorpe University has retained Diversified Search to assist in this recruitment. Nominations and applications will be accepted until the position is filled, but for fullest consideration, applications should be received by October 15, 2019. Applications and expressions of interest should be accompanied by a letter of interest, a curriculum vita, and the names and reliable contact information of at least five references. Letters of interest should thoughtfully respond to all that is outlined above and address how the candidate's experience and qualifications have prepared them for the role. Materials should be submitted electronically in confidence to [OUPresidency@divsearch.com](mailto:OUPresidency@divsearch.com).

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13977/10.2019



## **APPENDIX A: OGLETHORPE UNIVERSITY OVERVIEW**

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## ABOUT OGLETHORPE

Oglethorpe University (OU) marries exceptional thinking with hands-on opportunities to explore and practice in one of the world's major cities. It is this marriage of ideas and opportunity that is the hallmark of an Oglethorpe education.

Founded in 1835, OU is Atlanta's only co-educational small private college. It is currently home to 1,385 eclectic and engaged students from 36 states and 29 countries. With one of the most diverse student bodies in Georgia, OU is ranked #15 in diversity among National Liberal Arts Colleges by *US News & World Report*. OU's culture of acceptance and inclusion is one of its greatest attributes.



Bucking the trend among many small colleges today, Oglethorpe is in an unprecedented era of growth and innovation, evidenced by increased enrollment and philanthropic giving for capital projects, and new strategic entrepreneurial partnerships and programs. In 2018, Oglethorpe launched *Flagship 50*, a groundbreaking merit tuition scholarship program that matches all 50 states' flagship tuition for qualified students. The 2020 *Fiske Guide -to Colleges* named Oglethorpe one of only 20 "Best Buy Schools" in the nation and the only one in Georgia for the third year in a row.

This year marks the opening of the I.W. "Ike" Cousins Center for Science and Innovation and the Q. William Hammack, Jr. School of Business, made possible by a \$50 million gift commitment, the largest in OU's history, from alumnus Bill Hammack '73. In the past five years, Oglethorpe has seen the addition of an award-winning campus center; a residential complex with six state-of-the-art classrooms; and enhancements to arts and athletics facilities. Oglethorpe's study abroad venture with LeadAbroad has expanded its global footprint, with the development of five global programs in Barcelona, Cape Town, Athens, Paris, and Rome.

### Oglethorpe's Mission

Oglethorpe University provides a superior education in which liberal arts and sciences and professional programs complement each other in a small-college environment within a dynamic urban setting. Oglethorpe's programs emphasize intellectual curiosity, close collaboration among faculty and students, and engaged learning in relevant field experiences. Oglethorpe educates students to be citizens in a global world, readies them for responsible leadership, and empowers them to pursue meaningful lives and productive careers.

## Governance

Oglethorpe Board of Trustees embodies a tradition of trust and open communications with the university's President and the OU community at large. The Board has authorized seats for not less than fifteen or more than forty-five regularly elected voting members. Candidates for trusteeship usually come from among the alumni, parents, and friends of OU who have demonstrated a commitment to the university's stated mission and goals through expressed interest in and support of the institution and its programs. The President serves as an ex-officio member, and each board member serves one four-year term with the possibility of renewal for an additional term. After two terms, the member must rotate off the board; he/she will be eligible for reappointment after a one-year hiatus. Officers are elected to serve for one three-year term with new terms beginning July 1st.

The full Board typically meets in October, February and April each year. Specific committees may meet throughout the year as necessary. The Board meets its responsibilities through the actions and recommendations of the standing committees, which include the Executive, Governance, Mission Fulfillment, Fiscal Affairs, Advancement & Community Relations, and Campus Planning. The Audit and Investment sub-committees report into Fiscal Affairs; and the Academic Tenure and Degree sub-committee is part of Mission Fulfillment.

## Finances

Oglethorpe University utilizes a conservative fiscal strategy to support its steady enrollment growth and enhance the sustainability of its market position. A key underpinning is strict debt management, whereby



borrowings are limited to the acquisition of long-term, strategic assets and operating cash flows are not burdened by leasing or other short-term debt arrangements. Annual endowment payout percentages have also been steadily reduced, with a 4.2% payout level for FY2020.

In the past decade, Oglethorpe's borrowings as a percentage of assets have been cut in half, with current levels less than 20%. Debt has been reduced from \$19.2 million at the end of FY2014 to \$10.6 million at the end of FY2019. Smaller debt service expense obligations combined with a fiscal management focus on obtaining revenue growth that is a few percentage points higher than increases in operating expenses has produced positive operating cash flows at rates that have doubled over the past five fiscal years.

Consistent operating cash flow generation has allowed for increased reinvestment into campus facilities and programs, a key factor supporting operating initiatives to increase student recruiting and retention success rates. Campus improvement expenditures have more than doubled in the last three fiscal years, and the recently opened \$22 million I.W. "Ike" Cousins Center for Science and Innovation facility has been paid for without any addition to long-term debt.

## Location

Oglethorpe is ideally located in the newly-formed city of Brookhaven, an inner suburb of Atlanta recently cited as the safest city in the metro area and one of the most popular destinations for singles and families alike. The campus is situated on Atlanta's famous Peachtree Road, less than a mile from the Brookhaven-Oglethorpe University MARTA station and easily accessed from all major interstates. The university is just minutes from Atlanta's best shopping and dining.



Brookhaven boasts a variety of living options from large historic homes, mid-century bungalows, and newly-constructed homes, townhomes and apartments, including a new luxury rental apartment complex on Oglethorpe's campus. Residents enjoy an extensive and growing system of parks and walking trails, nature preserves, annual festivals, and top-notch public and private schools.

## History

Oglethorpe University, chartered in 1835 by the State of Georgia, was located at Midway, a small community near Milledgeville, then the capital of Georgia. Originally a Presbyterian institution, it was one of the earliest denominational institutions in the South (located below the Virginia line). The university was named after James Edward Oglethorpe, the colonial founder of Georgia. A philanthropist, military leader, and member of Parliament, Oglethorpe was regarded as one of Britain's most active 18th century humanitarians. He founded the slave-free colony of Georgia to allow the worthy poor an opportunity to transform their lives in the new world. Each February, OU celebrates Oglethorpe Day to commemorate the 1733 landing of Oglethorpe and the first colonists in Georgia; the community is reminded of the motto of the colony's trustees, *Non sibi sed aliis* (Not for self, but others).

Throughout its antebellum existence, the Oglethorpe curriculum consisted primarily of courses in Greek, Latin, classical literature, theology, and a surprising variety of natural sciences. Oglethorpe's most distinguished alumnus from the antebellum era was the poet, critic, and musician Sidney Lanier, who graduated in 1860. Lanier remained as tutor in 1861 until he, with other Oglethorpe cadets, marched away to war. Shortly before his death, Lanier remarked to a friend that his greatest intellectual impulse was during his college days at Oglethorpe University.

The university closed in 1862 due to the Civil War when its students were soldiers, its endowment was lost in Confederate bonds and its buildings were used for barracks and hospitals. In 1870, the institution was relocated to Atlanta (at the site of the present City Hall). During this brief period, Oglethorpe produced several educational innovations, expanding its curriculum to business and law courses and offering the first evening college classes in Georgia. However,



in 1872, Oglethorpe closed its doors for a second time.

Oglethorpe University was re-chartered in 1913 by Thornwell Jacobs as an independent, non-sectarian, co-educational institution and, in 1915, the cornerstone to a new campus was laid at its present location on Peachtree Road in Atlanta. The new campus was intended to be a “living memorial” to James Oglethorpe: the campus’ distinctive Gothic revival architecture was inspired by Oxford University, the alma mater of James Oglethorpe. The collegiate coat-of-arms, emblazoned with three boar’s heads and the inscription *Nescit Cedere* (“He does not know how to give up”), replicated the Oglethorpe family standard. For the college athletic teams, Jacobs chose an unusual mascot – a small, persistent seabird, which according to legend, had inspired James Oglethorpe while on board ship to Georgia in 1732. The Oglethorpe University nickname “Stormy Petrels” is unique in intercollegiate athletics.

OU’s curricular emphasis continued in the liberal arts and sciences and expanded into professional programs in business administration and education. From the 1920s through the 1940s, the institution received major contributions from several business community members whose names now appear on OU buildings -- John Thomas Lupton, Harry Hermance, Mrs. Robert J. Lowry, and publisher William Randolph Hearst, who gave to Oglethorpe a sizable donation of land. In the early 1930s, the Oglethorpe campus covered approximately 600 acres, including 30-acre Silver Lake, which was renamed Lake Phoebe after the publisher’s mother, Phoebe Apperson Hearst.



During the three-decade tenure of President Thornwell Jacobs, several projects brought national and international repute to Oglethorpe including the development of the Crypt of Civilization: the first modern time capsule which is located on the campus, not to be opened until the year 8113 A.D. Beginning in 1944, Oglethorpe University started a new era under noted attorney and educator Dr. Philip Weltner. With a group of faculty associates, Dr. Weltner initiated an exciting approach to undergraduate education called the

“Oglethorpe Idea.” It involved one of the earliest efforts to develop a core curriculum, with the twin aims to “make a life and to make a living.” The Oglethorpe Core, which was applauded by *The New York Times*, aimed at a common learning experience for students, with about one-half of every student’s academic program consisting of courses in “Citizenship” and “Human Understanding.” The core curriculum remains an integral part of an Oglethorpe education today.

From 1965 to 1972, the institution was called Oglethorpe College. But the historical identity of Oglethorpe University was so strong that in 1972 the original chartered name was re-established. By the 1980s, the Carnegie Foundation for the Advancement of Teaching had classified Oglethorpe in the category of Liberal Arts I. These highly selective undergraduate institutions award more than half of their degrees in the arts and sciences. By the 1990s, the university was listed favorably in publications and college guides as one of the nation’s top liberal arts colleges. Despite OU’s recognition as a small, rigorous liberal arts college, its financial means did not match its aspirations. Budgets were balanced by selling off substantial portions of

the university's 600 acres of land, leading to an impending financial crisis that could threaten the very survival of the institution.

### **A Remarkable Turnaround**

After Dr. Lawrence M. Schall assumed the presidency of Oglethorpe University on June 23, 2005, it quickly became clear that the university was facing a financial crisis. The financial audit, completed many months late because of the dysfunction of the accounting systems in place, revealed an institution in serious decline. The board was forced to spend more than 20% of the university's already meager endowment that year just to make payroll and meet expenses. President Schall asked both his chief financial officer and his controller to resign. Soon thereafter, hiring freezes were put into place; across-the-board wage cuts were implemented; and the pension contributions made by the university were frozen at zero.

In December 2007, Oglethorpe's accrediting agency, the Southern Association of Colleges and Schools (SACS), placed the university on warning status for its financial instability. This public sanction was continued a year later, and in December 2009, after two years on sanction, Oglethorpe faced a "do or die" vote by SACS. A visiting committee descended upon the campus and President Schall was called before the agency to make a formal case for why Oglethorpe should not lose its accreditation. These efforts to restore financial equilibrium and salvage Oglethorpe's future were successful. SACS removed its warning status and provided the university with a full and complete accreditation in 2009.

Oglethorpe's turnaround can be attributed to two consequential commitments: to live within its means and to grow, even as other liberal arts colleges were experiencing enrollment declines. The first commitment required disciplined financial planning and control, but the second required the reconsideration of what it means to be a liberal arts college in the 21<sup>st</sup> century. A telling example of this rethinking: the phrase "Oglethorpe bubble" was, at the time, a commonly used descriptor by faculty and students alike. Meaning: one entered the safety and sanctity of the bubble only to exit four years later. Students joked that the fence surrounding campus was making sure no one could leave. Yet Oglethorpe was one of the very few coeducational liberal arts colleges located in a major U.S. city. The President and Board quickly recognized that OU's greatest underperforming asset was the vast opportunity that awaited students outside the campus walls.



In 2010, the Board adopted a new strategic vision for Oglethorpe, one that looked out rather than in. OU's strategic plan, titled "The Oglethorpe Idea: Redefining Undergraduate Education through Unparalleled Engagement" was developed to make the engagement between theory and practice—on campus, in the city of Atlanta, and around the world—the hallmark of an Oglethorpe education. The plan set forth to fulfill, more ambitiously than ever, OU's long-held mission to "make a life, make a living, and make a difference."

The strategies were specifically crafted to build a strong, compelling identity for Oglethorpe that would lead to enrollment growth and improved retention. This growth, along with new strategic partnerships, would result in greater financial strength, allowing Oglethorpe to reinvest in people, programs and facilities to create a more exceptional education, fueling a cycle of growth, strength, and continued excellence.

Through this strategic plan, which sunsets in 2020, OU was to become a school of first choice for 400 first-year students seeking a deeply experiential, hands-on education in a large and thriving urban center. An Oglethorpe education would provide intensely personal and rigorous on-campus learning, designed to educate students to be citizens in a global world, ready them for responsible leadership, and empower them to pursue meaningful lives and productive careers. More than 400 first-year students enrolled in fall 2019.



While the vision behind the plan has remained the same, some of the tactics and opportunities pursued to achieve the vision have changed over the plan's ten-year lifespan. Yet it remains an entrepreneurial approach that expands the definition of Oglethorpe as an institution and what is done there.

The keys to OU's turnaround and recent success have been:

- Focusing on its core enterprise and unique value proposition, learning to make its curriculum both rigorous and relevant
- Creating alternative or additional routes to supplement its core business, which has been achieved successfully through partnerships
- Branding and identity building strategies
- Expansion of experiential opportunities, including growing our global footprint,
- Curricular innovation
- Campus enhancements and expansion, including the Turner Lynch Campus Center, Gables Brookhaven, and the Cousins Center for Science and Innovation



The results are fully evident in OU's overall institutional health. The 2017 10-year accreditation review resulted in a full reaffirmation without recommendations. In 2018, net cash from operations was \$4.1 million. This is in stark contrast to 2005 when OU experienced an audited net cash *loss* from operations of -\$4.3 million. Since 2005, Oglethorpe has increased net assets by 174%, while reducing total debt by 53%; increased annual revenues by 152%; increased the endowment by 154%; and experienced a

dramatic rise in philanthropic giving, with more than \$150 million raised.

During this time, non-instruction operating expenses have remained stable. OU has hired additional faculty and improved their compensation: merit pay increases have been awarded every year since 2013 (awarding a record pool of 3% during FY2019) and OU continues to pay over 70% of the cost for its employees' healthcare. The Board-approved endowment spending rate has been lowered every year from over 10% to a current 4.2%. Since 2013, OU has been able to cover 100% of depreciation costs. Its short-term line of credit debt, once used to make payroll, has been reduced from \$4.3 million to zero. Total debt has been continuously reduced and is now under \$11 million.

OU continues to enroll a record number of new students, with the size of the first-year class rising from 168 in 2005 to 400 this fall, a 138% increase. Overall, undergraduate enrollment has increased 65.3% between 2005 and 2019, with a current total enrollment of 1,372. In keeping with the university's entrepreneurial spirit, Oglethorpe launched *Flagship 50* in 2018, a groundbreaking merit tuition scholarship program that matches all 50 states' flagship tuition for qualified students. Oglethorpe was the only college in the nation to offer this match. In its first year, the program contributed significantly to a 23.4% increase in the first-year class and a 51.7% increase among the most academically talented students who qualified, resulting in significant gains to both the academic and economic profiles of the first-year class. OU's first-year advising program, *Compass*, has contributed to improvements in student retention rates, with first-year retention of OU's 2018 cohort at 80%; overall, 84% of students persisted or graduated in 2018.

Oglethorpe completed the largest fundraising campaign in its history in 2015, raising \$50.2 million and surpassing its goal two years ahead of schedule. This was followed soon after by a successfully completed \$21.6 million campaign for the I.W. "Ike" Cousins Center for Science and Innovation, which was completed in just eleven months—ahead of schedule and under budget. And in 2017, OU received a \$50 million gift commitment from alumnus Bill Hammack, retired CEO of CW Matthews, to establish the Q. William Hammack, Jr. School of Business—the largest gift in Oglethorpe's history and the largest to a liberal arts school to establish a school of business, which opened with the start of the 2019 academic year. In total, more than \$ 150 million has been raised since 2005.



In recent years, Oglethorpe has invested millions into the restoration of its historic campus on Peachtree Road, addressing critical deferred maintenance issues and constructing the award-winning Turner Lynch Campus Center, two residence halls, a residential complex with 6,000 square feet of state-of-the-art classrooms, and enhanced athletics and arts facilities, including a new scene shop. OU's physical footprint has also expanded with the launch of five global study abroad programs in Barcelona, Cape Town, Athens, Paris and Rome; and, the founding of the Center for Civic Engagement, which evolved into the formation of the Atlanta Laboratory for Learning (A\_LAB), an incubator for experiential learning.

In short, OU has not only turned around but is quickly and boldly headed on an upward trajectory of unparalleled proportions.

## FACULTY

At Oglethorpe, the promise of a great education is matched by a dedicated and passionate faculty. Oglethorpe faculty members are focused on fostering student learning. The current student-faculty ratio of 15:1 provides an environment in which the university's commitment to excellent teaching is primary. The foundation of this excellence rests in the quality of the Oglethorpe faculty, their dedication to providing a rigorous learning environment that incorporates innovative pedagogy, and their impressive achievements as scholars. Faculty members are not merely teachers and scholars, but also collaborators and mentors. Whether teaching courses in their discipline or a section of the Oglethorpe Core (which most do), faculty members bring a wealth of knowledge to classroom discussions, while constantly pushing students to delve deeper into the subject at hand. Oglethorpe's faculty are creative and innovative teachers. Many are also excellent scholars either on their own or in conjunction with students. All faculty contribute to their field of study and spend time out-of-class helping and advising their students to thrive.



OU faculty are also active teaching Oglethorpe students abroad, leading short-term class trips across the US and world, and guiding internships across Atlanta. At Oglethorpe, faculty members know their students more than simply as people in their classes, but as individuals whose lives they are affecting positively.

Oglethorpe University employs 45 tenured or tenure-track faculty, 27 full-time non-tenured faculty, and three librarians. OU is currently searching for eight faculty members for the coming year. Nearly all tenured and tenure-track faculty hold the terminal degree in their field. All undergraduate courses are taught by faculty members, and the normal teaching load is 3/3. Oglethorpe faculty include textbook authors, National Endowment for the Humanities fellows, a Guggenheim fellow, a French knight, a political columnist, scholars of Shakespeare and the Civil War, a best-selling novelist, a former Olympic athlete, community activists, and academic organization leaders.

While the student body is exceptionally diverse, OU's faculty diversity is on par with the national average, and increasing faculty diversity is an important goal. Full-time faculty are 47% female and 53% male, 78% white and 22% people of color. Last year, Oglethorpe received a \$500,000 grant from The Andrew W. Mellon Foundation to support a four-year effort to diversify faculty in the humanities. The grant will provide funding for the appointment of faculty members.

## STAFF

Oglethorpe has a relatively flat administrative organization, and staffing is lean. With 114 staff and an enrollment nearing 1,400, Oglethorpe has among the fewest staff per student of any liberal arts college in

the country. This has played a large part in the success of OU's business model, as annual expenses have remained quite low. However, it also means that compared to OU's peers, staff at Oglethorpe work much harder to achieve the same or better outcomes. For example, OU's expenses per student in 2017 were \$21,581 with 1250 students. On average, OU's peers are spending almost twice as much per student.

OU's staff is slightly more diverse than its faculty -- 63% are female, and 28% are people of color (higher than the national average). OU has been making great strides to increase staff diversity: Since the end of the spring 2019 semester, nine (out of 12) staff hires have been people of color.

## STUDENTS

Oglethorpe's student body has become increasingly cosmopolitan, with students drawn from 36 states and 29 countries. Oglethorpe students are bright, curious, and engaged. They want to really learn from their professors. They are independent, individual, involved, and willing to work—in the classroom, on the job, in the community. They are entrepreneurial thinkers who are not afraid to explore new ideas. Some are athletes; some are artists; some are unconventional; some are a bit quirky. Some are just plain weird, and proud of it!



They are personable and friendly, liberal and conservative. They come from the city, the suburbs, and the country—or another country altogether. They are confident in who they are, no matter who that might be. They know that leaders are born in the most unexpected places. They are free spirits and fierce

competitors. They come to Oglethorpe with open minds and open hearts. They work to build an accepting community where differences are embraced, where cliques are absent, and where “an active Greek life” means “everyone is welcome.” In short... There is no “typical” Oglethorpe student -- no standard to conform to and no background to blend into.

By the numbers, in 2019, Oglethorpe enrolled a total headcount of 13 85students, an increase of 9% over 2018. More than 40% are first-generation college students; 40% are Pell-eligible; and 51% identify as non-white. Women make up 57% of the student body. Sixty percent come from the greater metropolitan Atlanta area; 29% come from out of state; and nearly 9% are international. OU's campus is residential, with 64% of students living on campus in one of seven residence halls, six university-owned Greek houses, or Gables Brookhaven (a 374-unit residential complex that includes six-thousand square feet of state-of-the-art



laboratories for teaching and learning). Over 30% participate in one of 16 NCAA Division III athletic programs, and 21% are members of one of the nine Greek organizations on campus. Six percent of students are over the age of 25. Oglethorpe's first-year fall-to-fall retention is 80.4% and overall retention stands at 85.1%. OU's six-year graduation rate is 54%. Forty-one percent of students go on to graduate school.

## ACADEMICS

Oglethorpe's 60+ academically rigorous programs of study emphasize intellectual curiosity, individual attention, close collaboration among faculty and students, and active learning in relevant field experiences.



The average class size is 17; student-faculty ratio is 15:1; and 99% of class sections have fewer than 30 students. OU currently awards the bachelor of arts degree (BA) and the bachelor of science degree (BS) in its traditional undergraduate program and also offers the bachelor of arts in liberal studies (BALS) and bachelor of business administration (BBA) degrees to working adults in the Adult Degree Program. There are currently no online or hybrid courses.

Every undergraduate student establishes an intellectual foundation for life through the unique Oglethorpe Core—an integrated, sequenced and shared academic experience that creates a special intellectual community where important questions are examined across disciplines and from varying perspectives.

Through this distinctively modern approach to general education, Oglethorpe students are then able to establish meaningful expertise in their major area of study through a more thorough understanding of themselves and the world around them. It is a transformative experience that inspires OU graduates to learn for a lifetime.

### The Core

Oglethorpe initiated its “core curriculum” in the academic year 1944-45, making it one of the first core programs in the United States. In his explanatory brochure about the program, Oglethorpe President Philip Weltner presented a new liberal arts curriculum with the twin aims of equipping students to “make a life and make a living.” Each student would devote one half of his or her college course work to the common intellectual experience of the core, devoting the other half to his or her major area of study. In outlining his new plan and his philosophy of education, President Weltner anticipated some of the ideas featured in *General Education in a Free Society*, Harvard University’s 1945 statement stressing an emphasis on liberal arts and a core curriculum.



The idea of a core curriculum was at that time so revolutionary in higher education that news of the Oglethorpe Plan appeared in The New York Times in the spring of 1945. Dr. Weltner told The Times: “We are trying to develop keen...appreciation and understanding. Instead of dividing our courses into separate schools, we are giving the students a good liberal and general education which can become the basis of hundreds of vocations.”

Dr. Weltner’s core curriculum for the Oglethorpe students of the 1940s reflected the concerns of the war era: the core consisted of a series of courses under the headings “Citizenship” and “Human



Understanding.” As the concerns of the war era receded and the postwar information explosion ensued, the Oglethorpe core underwent extensive revision in the 1960s, with its required courses coming to resemble much more closely traditional courses in the disciplines. Gradually this core came to focus on those courses representing competencies that a well-educated generalist ought to have upon graduating from college.

With the support of a major grant from the National Endowment for the Humanities, the Oglethorpe core curriculum underwent substantial revision, in the early 1990s, to reflect a new idea about core curriculum and its purpose. Rather than an attempt to define what every student should know or a list of basic competencies every student should have, the new Oglethorpe core aimed at providing a common learning experience for all students.

Since the early 1990s the core curriculum has undergone further scrutiny and refinement. A National Endowment for the Humanities Challenge Grant in 1996 helped to create an endowment for the core curriculum, guaranteeing that faculty have the resources to keep the core vital and central to learning at Oglethorpe. Beginning in 1998, Oglethorpe implemented a sequence of new interdisciplinary year-long courses. These sequences, which extend over all four years of a student’s collegiate career, feature the reading of a number of primary texts common to all sections of the courses and frequent writing assignments. Each course in the sequence builds upon the body of knowledge studied in the previous course. Courses in the fine arts and in mathematics complement these sequences. The program explicitly invites students to integrate their core learning and to consider knowledge gained from study in the core as they approach study in their majors. Most recently, Oglethorpe mathematics faculty were awarded an NSF grant, part of NSF’s Engaging Mathematics initiative, to redesign curriculum for Great Ideas in Mathematics, the math component of the Oglethorpe Core.



As faculty work together through frequent conversation about the content and goals of their core courses to provide an integrated approach to learning, one is reminded of the pledge Dr. Weltner made over half

a century ago in outlining the core: “Oglethorpe University insists that the object is not to pass a subject; the object is to take and keep it.”

## Academic Innovation

### Science, Technology, Engineering, and Mathematics (STEM) Programs

The spirit of innovation is strong among OU science faculty who have been on the leading edge of a national movement to transform science pedagogy. For more than a decade, Oglethorpe’s STEM faculty have evaluated and improved curricula with the assistance of funding from the National Science Foundation (NSF) through a program called Science Education for New Civic Engagements and Responsibilities (SENCER). The goal of this program has been to drive interest to an important social or civic issue and utilize science instruction to address it. On average, more than 40% of Oglethorpe’s faculty in mathematics and sciences have participated in SENCER projects—greater than most other institutions nationwide, both large and small.



OU’s biology department has completely redesigned the biology curriculum to emphasize process rather than content, to integrate lab and lecture to enable students to learn while doing. Oglethorpe science faculty are working to make undergraduate research part of the Oglethorpe culture, and ensure every student who wants to work with faculty has that opportunity. A new faculty undergraduate research committee in the science division works to properly vet

and match interested students with all of the faculty-mentored research opportunities available to them. Those opportunities are expanding, both on- and off-campus.

Thanks to a joint grant between Oglethorpe and Emory University faculty, biology students have the opportunity to do research with Emory researchers. Students gain additional lab experience through a partnership with Mercer University. With the addition of new lab facilities in the Cousins Center for Science and Innovation, more Oglethorpe students are able to participate in mentored lab research on campus.

In 2018 an Oglethorpe professor received the institution’s first grant from the National Institutes of Health (NIH). The three-year R15 grant supports undergraduate research and is designed to strengthen the research environment of schools that have not been major recipients of NIH support. In Chemistry, faculty are working with students to build out a new research lab. As part of the Cousins Center project, a new Nuclear Magnetic Resonance (NMR) spectroscope has been installed for the exclusive use of undergraduates and faculty in coursework and research. Additionally, the physics program, home to the Dual-degree Engineering major (a 3-2 program with partner institutions including Georgia Tech), has expanded their options to include tracks in physics & liberal studies, astrophysics, computational physics, engineering and general physics.

## The Cousins Center for Science and Innovation

The new I.W. “Ike” Cousins Center for Science and Innovation, opened in Summer 2019, is designed to elevate students’ intellectual curiosity and facilitate engaged teaching and active education. It brings the liberal arts and sciences to life in a way that symbolizes the future of Oglethorpe University: inclusive, collaborative, innovative. Blurring the line between classroom and practice, the Cousins Center will implement a natural flow between scientific work done inside and outside the laboratory. While OU science majors are numerous and important, it is at the intersection of science and business – which collectively touches at least 70 percent of the University’s students – where the challenges of society lie.



The Cousins Center provides learning spaces for interactive study and idea sharing across disciplines, with specific emphasis on science and business. The design of the new center encourages a cross-disciplinary approach to education, with open study rooms, workshops, flex-spaces, and office spaces that bring together diverse people and different subjects. Such spaces, and such interaction, will enhance Oglethorpe’s ability to graduate students with the experiences and the skills to prosper in the 21st century workplace and be of service to the Atlanta community and the world beyond.



Oglethorpe’s new academic concentrations and certificates will be housed in the Cousins Center, allowing students to supplement their major with a focus on a specific area of interest that helps prepare them for a profession. The Cousins Center offers space for students in these programs to have the necessary cross-disciplinary conversations and cohort group work, a space that is more creative, informal, and with a deliberate design to foster engagement. The interactions facilitated by the spaces in the Cousins Center allow OU to build upon its vision of an education that begins in the classroom and extends out into the real world at every opportunity.

The Cousins Center also enables Oglethorpe to better integrate an academic emphasis into its renowned service-learning program. The small study spaces, hallways, and alcoves of the Cousins Center have been purposefully designed to encourage interaction and connections, allowing the transformation of service learning into a true co-curricular experience.

## Academic Concentrations

In 2016, faculty explored the development of “concentrations” – programs that focus on modeling applied liberal arts. The goal was to develop a program that was more adaptable and agile than a traditional major or minor, reaches across disciplinary boundaries, and allows the faculty to demonstrate to students how their newly acquired liberal arts sensibilities (critical thinking, problem-solving, interdisciplinary collaboration) can be applied to vocational interests.

An Oglethorpe concentration allows a student to supplement the foundational work in their major with a cross-disciplinary learning experience that includes a formal introduction to the career track and academically-supported experiential learning. Oglethorpe’s pilot concentration in public health was designed with the advice of 32 public health professionals to recognize the importance of interdisciplinary approaches to overcome global challenges. The public health concentration – encompassing three newly created workshop and practicum courses, three electives, a capstone course, and an internship – draws on Oglethorpe’s combination of a liberal arts education and work experiences to encourage students to develop the broader perspectives, creative solutions, and “big-picture” thinking that results in holistic solutions.



## Hammack School of Business

When Oglethorpe University relocated to Atlanta in 1870, it was one of the first institutions offering business and commerce courses in the US. The Hammack School of Business, launched in fall of 2019, represents the newest chapter in that innovative history. This transformational stage is made possible by a \$50 million gift from Oglethorpe alumnus Q. William “Bill” Hammack, Jr. ’73 – the largest gift in Oglethorpe’s 182-year history.

In April 2019 a five-year strategic plan was approved for the Hammack School of Business. The plan focuses on growth: in programs, in student enrollment, and in the hiring of new faculty to support both. The plan focuses on pursuing a differentiated strategy that includes expanding majors, creating unique courses and certificate offerings, expanding business offerings to non-majors, keeping/enhancing the unique liberal arts foundation, and committing to high engagement teaching, experiential learning and post-graduate support.

## New Programs

OU’s Communication Studies program has rewritten its curriculum to move from a traditional rhetoric-based program of study to a modern communication studies program with several distinct professional tracks: Media Studies, Public Relations, and Rhetoric and Public Discourse. Similarly, OU’s Studio Art program has expanded with new tracks in Filmmaking, Video & Photography, and Medical & Scientific Illustration. Due to the popularity of courses in film production and digital media and the booming film industry in Atlanta, OU has also developed a new major in Film & Media Studies, launching fall 2020, pending SACS approval. To support the programs in

communication, art and film, OU recently completed the construction of two state-of-the-art digital media teaching labs and specialized editing studios for sound, podcasting, etc. that opened in fall 2019.

Additional programs have recently been added or revamped including African American Studies; a dual-degree program in Education with Mercer University; Environmental Science; Non-profit Management; and Women’s, Gender and Sexuality Studies. In early 2019, Oglethorpe joined Georgia Tech as one of only two Amazon Web Services Academy member institutions in Georgia, offering AWS cloud-computing certification.

## **ATLANTA LABORATORY FOR LEARNING (A\_LAB)**

Oglethorpe marries theory and practice through the A\_LAB, which serves as an incubator for students’ real-world experiential learning through civic engagement, global education, career development and undergraduate research. The concept originated from a need to bridge the divide between OU students’ wide variety of experiences with the learning taking place in the classroom— to help students map their journey and learn to tell their own life stories.

### **Civic Engagement**

Atlanta matters to Oglethorpe and Oglethorpe matters to Atlanta. Through extensive service learning and volunteer opportunities throughout the city, including an orientation day of service in which all new students participate, the Oglethorpe community makes a difference in Atlanta. Oglethorpe is the only university in Georgia to be named to the President’s Higher Education Community Service Honor Roll for commitment to and achievement in community service every year since its inception.

### **Global Education**



Oglethorpe students experience the world on OU’s diverse multicultural campus, in OU’s global city, or through one of OU’s enriching international study experiences. The university has expanded its global reach through strategic partnerships with Study Group, an international student recruiter, and study abroad provider LeadAbroad. The University’s five global programs in Barcelona, Cape Town, Athens, London, and Rome are open to any college student looking to earn summer credit. Last summer, over 600 students from more than 60 universities studied abroad in an Oglethorpe global program and earned Oglethorpe course credit.

## Career Development

Atlanta is home to the third largest concentration of Fortune 500 corporations in the U.S. and over 1,250 multi-national corporations. Oglethorpe's connections to Atlanta's civic and business communities run deep. OU guarantees at least one internship to every student who wants one. In fact, 96% of OU students report engagement in experiential learning through jobs or internships. Students have recently interned or accepted positions at organizations including Amazon, Atlanta Hawks, Children's Healthcare of Atlanta, Deloitte, DHL, Ernst & Young, Global Payments, Harley Davidson, Insight Global, Newell Brands, Porsche, UPS, and the United States House of Representatives.



## Undergraduate Research and Scholarship

OU students explore the depths of their academic disciplines through guided research and scholarship led by experienced OU faculty. Oglethorpe's 15:1 student to faculty ratio guarantees personal attention for each student on his or her academic journey. Through course work or the Honors Program, students publish papers or present research at academic conferences with faculty support. Oglethorpe's *Journal of Undergraduate Research* (OJUR) is a scholarly journal promoting undergraduate research. It seeks to preserve and make available the creative and academic invention of Oglethorpe's campus constituency. The journal serves as both a digital repository of scholarly output and a platform for publishing works of the campus community that promote inventive and original works. Each spring, the entire university participates in a day-long celebration of exemplary analytic and creative work produced by Oglethorpe students under faculty mentorship in the Liberal Arts & Sciences Symposium and PRISM (Posters of Research in Science and Mathematics).

Many students continue their education and research after Oglethorpe. Recent graduates are enrolled in graduate programs at some of the world's top institutions including Yale University, Oxford University, Vanderbilt University, Northwestern University, Columbia University, University of Florida, Emory University and University of Georgia in fields ranging from law to film, chemistry, physics and medicine.

## Compass

Rather than focus on a single capstone experience during the last semester, the A\_LAB experience begins in the freshman year and extends through all four years of students' education. It kicks off with Compass, OU's nationally-recognized first-year advising program that helps first-year students to identify, clarify, and achieve their education, career, and personal goals. Advisors, comprised of faculty and staff, encourage and guide students through their first year at Oglethorpe University, inspiring them to seek academic-professional-personal-social balance.



## THE ARTS

### The Performing Arts

The Conant Performing Arts Center at Oglethorpe University seats 511 and is home to five student theatre productions and numerous professional performances throughout the year. Located adjacent to the Conant Performing Arts Center, the Reiser Scene Shop, completed in 2012, allows for weather-proof, climate-controlled space for the design and construction of the sets needed for OU Theatre performances. Through partnerships with the top names in the Atlanta performing arts community, including the Tony Award-winning Alliance Theatre and Atlanta Symphony Orchestra, OU students have opportunities to intern and perform with professionals on stage.



OU's music program is experiencing tremendous growth as evidenced by the tripling of members in the Oglethorpe University Singers. And as OU's popular jazz ensemble, the Jazzy Petrels, has grown, faculty are now recruiting talent for a community symphony orchestra.

### The Oglethorpe University Museum of Art

The Oglethorpe University Museum of Art (OUMA) presents at least three major and several smaller exhibitions each year, featuring artwork which is international, representational, figurative, and spiritual in nature, reflecting the unique OUMA mission statement. OUMA is comprised of three spaces: The Shelley and Donald Rubin Gallery, the Skylight Gallery, and the Center Gallery. Lecture and concert series complement exhibitions on view.

OUMA is the only small liberal arts university museum in the Southeast that regularly shows nationally and internationally recognized exhibitions. Each semester OUMA offers gallery assistant internships, independent study, and work study opportunities. A new research center offers research resources and guidance to students. Collaborative planning with faculty and staff allows for direct course development in conjunction with exhibitions to give students an immersive experience. OUMA is a rare asset on campus, helping the university in fulfilling its goal to provide a superior liberal arts education.



As a result of the generosity and commitment of OU donors, OUMA’s permanent collection now boasts nearly 700 objects spanning over seven centuries. The collection has a broad assemblage of drawings, prints and paintings from the various schools in the art of 19th and 20th century France, including works by Eugène Boudin, Camille Pissarro, Constantin Guys, Eugène Delacroix, Julien Dupré and Henri Matisse, among others. The museum’s permanent collection also holds unique concentration in the field of Japanese porcelain ranging from the 17th to early 20th century.

## ATHLETICS

Oglethorpe has one of the oldest traditions of intercollegiate athletics in the state of Georgia. Sixteen teams play in the NCAA’s largest division, Division III, in the Southern Athletic Association (SAA) – a league of the most selective liberal arts colleges in the South. With 30% of the student body playing a sport, student-athletes play a big role at Oglethorpe, driving core values like dedication and teamwork. OU student-athletes also earn higher GPAs on average than the rest of the student body.



The athletics program has experienced tremendous success in recent seasons. OU’s nationally-ranked women’s basketball team has earned NCAA tournament bids for the past two seasons. Men’s soccer has won three conference championships in the past four years. The men’s golf teams have earned 13 conference championships and two national championships. In 2014, Oglethorpe golf made history with the first D-III player to be selected for the U.S. Palmer Cup Team.

## THE PETREL PROMISE

As part of its commitment to student success, Oglethorpe promises that eligible students will:

- graduate within four years or pay no tuition for credits needed to graduate in five years.
- secure full-time employment or admission into a graduate school within six months of graduation, or return for a full year tuition-free.

## ALUMNI

Sixty-six percent of OU’s 11,500 living alumni live in the Atlanta Metro region. Alumni are deeply involved in the campus community -- helping students find a job, volunteering alongside them in university-wide days of service, serving on the Board of Trustees, or contributing to scholarship funds. Alumni are engaged

through programming aimed at various affinity groups including: Young Alumni, athletics, the arts, Greek life, leadership organizations, locations around the country, and by major such as Humanities, Business and STEM.

The Oglethorpe Office of Alumni Relations serves approximately 9,000 alumni for whom they have contact information, promoting increased alumni engagement with the university and strengthening connections to the university and within the alumni community. Among approximately 80 on-and-off-campus events per year, alumni are invited to attend two annual significant, traditional events on campus: Alumni Weekend (April) and Evening of Holiday Enchantment (December). The Alumni Office collaborates regularly with other campus departments such as Student Life, Career Development, Athletics and Admissions to find



avenues for alumni volunteers and connection with current students. Alumni are also engaged as volunteers as class reunion hosts, Scholarship Weekend interviewers, speakers on career panels and in classrooms, the Alumni Board and other event host committees. The Alumni Board is comprised of approximately 28 alumni and meets four times a year.

Alumni receive the Carillon Alumni News magazine, produced by Alumni Relations staff, twice yearly, as well as a monthly eNews letter and various printed and email communications. Alumni are also actively engaged with the university and the Alumni Office through social media outreach and the alumni website ([alumni.oglethorpe.edu](http://alumni.oglethorpe.edu)). Alumni engagement begins with current students who are members of STAT: Students Today, Alumni tomorrow, coordinated by the Office of Alumni Relations, which fosters leadership development and provides opportunities for networking with alumni. Engagement extends beyond the 50th Reunion Class within the Golden Petrel Society, with programming honoring graduates out for 50 years or more.

OU's average alumni giving participation rate is 10%, which OU is working to improve. However, Oglethorpe recently received two 2019 Educational Fundraising Awards from the Council for Advancement and Support of Education (CASE) for overall performance and overall improvement. Oglethorpe is among only five institutions nationwide with the unique distinction of receiving awards in both categories.

## ADVANCEMENT

In October 2015, Oglethorpe University completed the “Our Time” Comprehensive Campaign when it reached a total of \$50,195,216 on its \$50 million goal. Launched in 2010 and slated to last over a seven-year period, the Campaign secured \$22.5 million for capital improvements (e.g., the Turner-Lynch Campus Center and Scene Shop); \$9.5 million for the Annual Fund; \$12.5 million in Planned Gifts for the Endowment; and \$5.5 million in In-Kind gifts (primarily pieces of art for the museum). Trustees and Alumni each contributed 26% of the total raised; foundations gave 27%; corporations donated 13%; and the



remainder came from Friends, Parents, Staff and Faculty.

Planning for the new Center for Science and Innovation and campaign preparation began in January 2016, with a Feasibility Study followed by the formation of a Campaign Steering Committee. Trustee solicitation ran from October 2016 to April 2017 with the external phase launching in May 2017. The goal of \$20 million was reached in February 2018, and the campaign closed on June 30, 2018 having acquired \$21.6 million.

The cultivation process for the Center for Science and Innovation led to conversations with alumnus Q. William “Bill” Hammack, who expressed interest in funding the business program from which he had graduated. He subsequently provided a significant gift to create what is now the Hammack Business School, pledging \$50 million (\$5 million outright and \$45 million in a future planned gift). This is the largest gift from a single donor (to-date) to the university.

Oglethorpe’s Advancement program has been recognized with a 2019 CASE Educational Fundraising Award; an honor given each year to exceptional fundraising programs at educational institutions in the United States. Recognized for Overall Improvement and for Overall Performance, Oglethorpe was among a select group of more than 90 colleges and universities receiving awards this year.

## RANKINGS/ACCOLADES

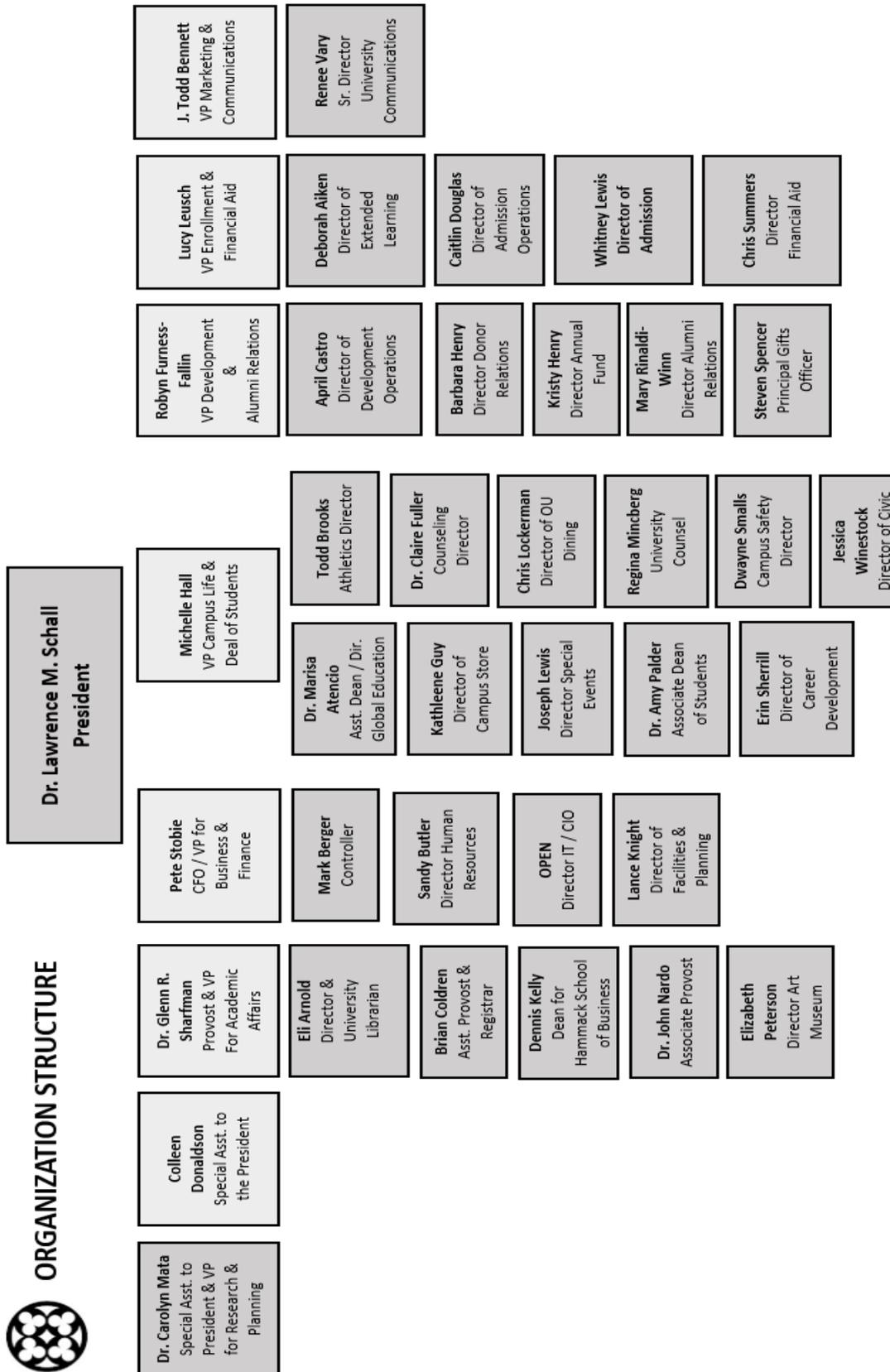
In addition to making the select 2020 *Fiske Guide* list of “Best Buy Colleges and Universities,” Oglethorpe was also recognized by *Kiplinger* as a best college value. Oglethorpe was recently named to *Forbes’* Top Colleges list and the *Princeton Review’s* Best Colleges in the Southeast for 2020. In its 2020 list of top national liberal arts colleges, *US News* ranks Oglethorpe #15 for diversity and #25 for social mobility. Oglethorpe has also been recognized by *Washington Monthly* for its success in graduating Pell Grant recipients, by PayScale for the median salaries of OU graduates, and by LendEDU for the amount of aid given to international students, the low amount of student debt, and affordability for freshmen with financial aid needs. Oglethorpe has received the highest possible financial responsibility score from the U.S. Department of Education, a measure of a school’s overall financial strength and eligibility to award financial aid. Oglethorpe is Georgia’s only co-educational member of the Annapolis Group, an organization of America’s most selective liberal arts institutions. Oglethorpe is accredited by the Southern Association of Colleges and Schools (SACS).

## OGLETHORPE'S FUTURE

It is legend that the British General James Edward Oglethorpe, founder of the colony of Georgia and OU's namesake, was inspired by a small, gutsy seabird that dove in and out of the crashing ocean waves as he crossed the Atlantic Ocean in 1732. It was this bird that became OU's mascot, the stormy petrel, and inspired the motto that is embossed on OU's crest, *Nescit Cedere*—"he who does not know how to give up." Like the stormy petrel, Oglethorpe University boldly flew into the face of adversity and never gave up. Today, Oglethorpe has emerged from the storms and the horizon could not be brighter.



# APPENDIX B: OGLETHORPE ORGANIZATION CHART



## APPENDIX C: LISTING OF TRUSTEES

<b>Mr Timothy P Tassopoulos<sup>1</sup> '81</b> President and COO Chick-fil-A Inc.	<b>Mr Cameron M. Bready<sup>2</sup> '94</b> Senior EVP & CFO Global Payments, Inc.	<b>Mr Robert E. Reiser, Jr.<sup>3</sup></b> Senior Investment Advisor Balentine
<b>Ms S. Tammy Pearson<sup>4</sup> '86</b> VP & Assistant General Counsel Chick-fil-A, Inc.	<b>Mr Richard Bakare '03</b> Solutions Architect Zuora	<b>Mrs Joselyn Butler Baker '91</b> Founder Butler Baker Communications
<b>Mr Ricardo C. Carvalho '85</b> President Latin American Company	<b>Mr L. Thomas Clements '86</b> Attorney at Law Clements & Sweet LLP	<b>Ms Mariya Nikolaeva Davis</b> Attorney at Law Metro Atlanta Business Court
<b>Mr Kevin D. Fitzpatrick, Jr. '78</b> Partner DeLong, Caldwell, Bridgers, Fitzpatrick & Benjamin LLC	<b>Mr D. Austin Gillis '01</b> Attorney at Law Moore, Ingram, Johnson & Steele LLP	<b>Ms Dianne Glennie '83</b>
<b>Mr Jack Guynn H'05</b> President (ret.) Federal Reserve Bank of Atlanta	<b>Mr James V. Hartlage, Jr. '65</b> Chairman and CEO Hartlage Management Company	<b>Mr H. Theodore (Ted) Heintz, Jr.</b> Indicator Coordinator (ret.) White House Council on Environmental Quality
<b>Mr J. Cleveland (Cleve) Hill '01</b> Managing Partner Hill & Watchko LLC	<b>Ms Meredith Lackey</b> SVP & General Counsel Georgia Power Company	<b>Mr Joseph (Joe) Lawrence</b> EVP & Chief Operating Officer Porsche Cars North America, Inc
<b>Mr David (Dave) M. Leonard</b> Atlanta Office Managing Shareholder Carlton Fields Jordan Burt	<b>Mr James W. Lewis</b> President The National Society of High School Scholars	<b>Mr Jason Lewis '09</b> Owner Lightnin' Production Rentals
<b>Mr Joseph Luke '04</b> Vice President, M&A Graphic Packaging International	<b>Mrs Belle Turner Lynch '61 H'10</b>	<b>Mr J. Russell Magbee, Jr.</b> Managing Partner Champion & Magbee Financial Services
<b>Mr Milford McGuirt</b> Office Managing Partner KPMG LLP	<b>Mr Cemal Özgörkey '84</b> Chairman Özgörkey Holding	<b>Mr Cody L. Partin '02</b> SVP, Total Rewards and People Operations Cox Enterprises, Inc.

<sup>1</sup> Chairman    <sup>2</sup> Vice Chairman    <sup>3</sup> Treasurer    <sup>4</sup> Secretary

<b>Mr David R. Pass '98</b> Partner Sealy Real Estate	<b>Ms Anita Patterson '97</b> Director of Treasury Services (ret.) Cox Enterprises, Inc.	<b>Mr Mohit (Mo) Ramani</b> EVP and Chief Risk Officer Wholesale Banking SunTrust Banks, Inc.
<b>Mr T. Randall (Randy) Roberson '97</b> VP, Leadership Development NACUBO	<b>Mr Clifford (Cliff) Robinson '89</b> Senior Vice President, Operations Chick-fil-A, Inc.	<b>Mr Brian C. Sass '84</b> CEO & President BSC Ventures
<b>Dr Lawrence (Larry) Schall</b> (ex-officio) President Oglethorpe University	<b>Mr Joseph P. Shelton '91</b> Partner Fisher & Phillips LLP	<b>Dr William (Bill) O. Shropshire H'14</b> Callaway Professor of Economics Professor Emeritus of Economics Oglethorpe University (ret.)
<b>Mr Mike Succo</b> VP East Region Coca-Cola Bottling, Co.	<b>Mr Neil Tofsky '74</b> President & CEO Senterra Real Estate Group	<b>Mrs Trishanda (Trish) Treadwell '96</b> Partner Parker, Hudson, Ranier & Dobbs LLC
<b>Mr Charles T. (Terry) White</b> President (retired) Rayloc Division of Genuine Parts Company	<b>Mr James (Jay) Williams '99</b> Chief Financial Officer Commodity Marketing Company	<b>Mr James (Jim) Winestock '14</b> SVP US Operations (ret.) United Parcel Service
<b>Mrs Yetty L. Arp '68</b> Real Estate Broker Atlanta Fine Homes	<b>Mr Robert E. Bowden '66</b> Chief Executive Officer (ret.) Robert Bowden, Inc.	<b>Mr Kenneth (Ken) S. Chesnut, Sr.</b> President & CEO (ret.) IBG Construction Services LLC
<b>Mr William (Bill) R. Goodell</b> Chief Operation Officer Partner Fund Management	<b>Dr Warren Y. Jobe H'09</b> Executive Vice President (ret.) Georgia Power Company	<b>Mr Bob T. Nance '63</b> President Nance Carpet & Rug Company
<b>Mr Thomas P. O'Connor '67</b> President Springs Global US, Inc.	<b>Mr R. D. (Rod) Odom</b> President & CEO (ret.) AT&T Southeast	<b>Mr John (Jack) J. Scalley</b> Executive Vice President (ret.) Genuine Parts Company
<b>Mr Arnold (Arnie) B Sidman</b> Of Counsel (ret.) Chamberlain, Hrdlicka, White, Williams & Martin	<b>Rev Dr G. Gilman (Gil) Watson '68</b> Senior Pastor (ret.) Northside United Methodist Church	<b>Dr Russ Churchwell '04</b> Anesthesiologist TeamHealth

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ADVISORY TRUSTEES



<p><b>Mr Pierre Ferrari</b> President &amp; Chief Executive Officer Heifer International</p>	<p><b>Mr Norman (Norm) P. Findley III</b> Executive Vice President (ret.) Coca-Cola Enterprises, Inc.</p>	<p><b>Mr Clifford L. Foster '11</b> Analytical Lead, Pharmaceutical &amp; OTC Google</p>
<p><b>Mr Stuart Hain</b> Vice President, Facilities and Capital Projects (ret.) Swarthmore College</p>	<p><b>Ms Carol Lanier Lamar '87</b> VP of Investments Cox Enterprises, Inc.</p>	<p><b>Ms Kimberly O'Dell '10</b> Loyalty Program Marketing Manager Intercontinental Hotels Group</p>
<p><b>Mr John Shelnett '84</b> Vice President Blue Danube Systems, Inc.</p>	<p><b>Mrs Dean DuBose Smith '70</b> Event Coordinator Atlanta Botanical Garden &amp; Alliance Theatre</p>	

ADVISORY TRUSTEES