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Finding The Next Great Head Coach

Background

Three different NCAA Division I athletic departments are searching for a new men's basketball head coach. Each school has completed a needs assessment describing their unique local context. The case study compels participants to engage in issues of human resources, organizational behavior, candidate assessment and teamwork. It also examines the cultural, psychological, and social aspects of a high-profile search process.

The search committee at each school is composed of five different individuals – each with varying degrees of implicit and explicit power, and distinctive perspectives and influences on the hire. During the search, the athletics director must manage numerous constituents who are engaged and contemplate the dynamics that these constituents create on the hiring process.

As with most Division I men's basketball head coach searches, the case study reconstructs personal, cultural, public and professional tensions the participants must navigate (individually and collectively) to determine the next head coach. It also considers university, athletics department, and personal and professional implications. In some instances, these implications are not always aligned with what is best for the department and/or university. Throughout the process, participants must systematically navigate through objective and subjective data while managing the numerous complexities existing within a highly scrutinized organization.

Participants

Three institutions, Spruce University, Desert Valley College, Bluewater A&M University, each school face their own unique challenges from an athletic and institutional standpoint. Accordingly, a careful assessment of each head coaching candidate's background, experience and skill sets is required to find the most appropriate match.

The search committee at each school is comprised of five members: Director of Athletics, Deputy AD/Senior Women's Administrator, Associate AD for External Affairs, Faculty Athletics Representative, and a basketball alum who is also a donor. The perspective of each committee member presents personal and professional tensions that the athletics director must negotiate throughout the search process.

Three coaching candidates – Josh Schertz, Terry Johnson, Robert Jones – have been selected by the search committee as finalists for the open vacancies. Each coach has achieved a great deal of success through a long tenure and wide-ranging set of experiences in collegiate basketball. Profiles for each candidate provide committee members with key high-level background information. They have also completed pre-recorded video interviews conducted by Collegiate Sports Associates to provide additional insights to the search committee.

Objectives

The case study has the following learning objectives:

- 1. Engaging, contemplating and developing a professional search process for a highly visible university leadership position.
- 2. Empathizing with the distinctive lens of various stakeholders in the search process.
- 3. Working collaboratively toward a shared vision of leadership while simultaneously reflecting on personal/professional implications.
- 4. Navigating the implicit and explicit tensions of institutional, organizational and program needs in a context of diverse perspectives and opinions.
- 5. The ability to evaluating candidates relative to programmatic needs assessment.
- 6. Understanding the relationship between objective and subjective data as influencers (and exploring the ways values intertwine with policies and communications).
- 7. Reflecting and critiquing individual and team performance.

Instructions

The case study is intended to be completed in groups of up to five people, although may be completed by a single individual. Group facilitators should first assign a search committee role to each group member, distribute the institutional and candidate profiles, as well as the Coach Hiring Matrix.

To maximize learning outcomes, the group should work on one vacancy at a time. Facilitators may choose to have participants switch search committee roles for each vacancy, or remain in the same role throughout the case study process.

Facilitators should refer to the Teaching Note for further instructions and discussion points.

Director of Athletics

Drawing from an extensive career shaped by a variety of responsibilities, the Athletics Director has always demonstrated loyalty and commitment. Anyone who has worked closely with the AD is familiar with their operating motto: "Our words and actions should model what we expect of our student-athletes."

With foundational experiences in sport operations and student-athlete support, the AD focuses on student-athlete development and frames policy decisions by answering the question: "In what ways will this help our students grow?"

While the AD is popular with the students, one consistent criticism is their limited visibility and accessibility. They are regularly pulled off-campus to meet with donors, alums and corporate partners, thus leaving coaches, staff and student-athletes with limited contact and underdeveloped relationships. Student-athletes and coaches are pleased with the progress made in areas like facilities, but not having a relationship is threatening the internal reputation of the AD. The basketball search process is seen by the department as an opportunity to improve communications and cultivate broader and deeper relationships with staff.

The president is relatively new and loves athletics. They are not a micromanager, but very engaged in most athletics matters. However, as part of their initiative to overhaul the image of the university, the president has pressured the AD to make wholesale changes to help symbolize the new era. The men's basketball program is seen as one of the key public-facing assets because it has a strong local following - particularly with families and retirees. Furthermore, the president has voiced to the AD that they are not afraid of challenging the status quo when making a hire. The president intends to make the school a national trendsetter across its major leadership positions in academia and athletics.

The AD was hired by the previous president, and while they have a good relationship with the current President, they have yet to be given a vote of confidence heading into year 2 of a 3-year contract. The AD believes the quality of this first big hire may directly affect their longevity at the school, and prefers to make a safe, non-controversial, choice.

Deputy AD and Senior Women's Administrator

The SWA is a minority student-athlete alum and played for the legendary head coach of the volleyball team (who endorsed her for the job). After a successful coaching career, they left athletics for personal reasons and worked in corporate sales managing a regional team with great success before returning to the SWA role.

When the previous AD left, the president offered the SWA the interim AD title if she would not have an interest in applying for the permanent position. She accepted, and managed the staff well during the interim period. Her tenure as interim AD further demonstrated the strength of her leadership and communication skills, and improved her already-strong reputation. Additionally, she was able to exhibit her skills across campus on the President's Cabinet in ways university leadership had not previously observed. Even though she was given the Deputy AD title because of her exceptional work during the transition, the SWA was admittedly disappointed when the president did not attempt to re-engage her about interviewing for the permanent AD position.

Having faced equity challenges as a coach, the SWA is a staunch advocate for program equality and a champion for consistent opportunities for each program. In many ways, the SWA has presented rational, data-driven arguments for new policies that, at-times, have been uncomfortable for the AD and president given the fact that recent hires in the department have been almost all Caucasian males.

One of the returning student-athletes on the men's basketball team was the conference freshman-of-the-year and expected to be one of the top scorers in the league as a sophomore. The SWA has developed a strong relationship with the student-athlete's parents, who indicated to her they will consider transferring if the new coach doesn't have experience in developing student-athletes into NBA players.

A major pet-peeve of the SWA is the implicit priority that is always granted to the men's basketball team. For example, whenever there is a facility conflict that interferes with practices (such as an outside speaker or other university function in the facilities) the men's team is given first priority to use available facilities and other teams must rearrange their schedules or not practice on those days. Additionally, basketball has first scheduling choices for the weight room, training room, academic center and cafeteria so the other teams must work around them. Finally, men's basketball gets the first draw of the summer school b udget (whether the student-athletes need the classes or not to stay on track academically) leaving many other programs without enough funds to support their own student-athletes. The SWA has equity concerns about these issues.

Associate AD for External Affairs

The Associate AD for External Affairs is an alum, former golf team captain, and through their job responsibilities has built extensive relationships with key stakeholders, donors, alums, trustees and regional merchants. Because of these relationships, the position hears enthusiastic feedback during good times and negativity during bad times. With the recent basketball struggles, the Associate AD knows the coaching hire is critical to the tenure of the AD as the key stakeholders have articulated their expectations.

The Associate AD aspires to be an Athletics Director at their alma mater and feels experientially prepared as well as sufficiently connected with the community of Athletics constituents. The position affords the opportunity to avoid criticism of key Athletics decisions yet access to influential supporters of the program.

Given the AD's extensive experience in external matters, the Associate AD sometimes feels micromanaged. Additionally, the Associate AD has no sport administration responsibilities because the AD wants the position to be exclusively focused on revenue generation.

The Associate AD was disappointed not to be chosen as interim AD, and passed over for the Deputy title, and there is tension with the SWA because of her appointment. He feels the search process is an opportunity to distinguish himself as the most talented member of the senior athletics staff, and is unlikely to support the same candidate as the SWA, especially if her pick goes against what the AD wants to do.

Faculty Athletics Representative

Serving for over 12 years as the school's Faculty Athletics Representative, the FAR is highly respected across campus and has served on multiple NCAA and conference committees - including the Academic Progress Rate and Graduation Success Rate Committees.

The FAR's research interests include diversity in athletics and catering academic and athletic curricula to holistically maximize the development of student-athletes. A famous research article authored by the FAR was titled: "Effectively Engaging Diversity as a Catalyst to Student-Athlete Growth and Development." Rather than view diversity and inclusion as a potentially volatile subject to be ignored, the FAR is passionate about fully implementing diversity as a pedagogical tool.

They also have expressed concerns about the academic profiles of many men's basketball recruits in recent years. Additionally, the FAR annually monitors the distribution of academic majors by team, gender and race and realized the majority of the basketball team is majoring in a subject generally considered the least rigorous on campus.

The FAR does not particularly care for the AD, who has done a poor job of building a relationship with school faculty. The FAR wants the school to hire a candidate from an underrepresented background to serve as a role model for the student-athletes.

Basketball Alum and Donor

The Men's Basketball Alum is the best player in the history of the school and continues to be fully engaged in the program, driving some 10 hours at least 5 times each year to watch games and support the team. He still holds school records in career most points, game most points, career and game most rebounds, and career most assists.

After graduation, the Alum had a short stint in the NBA, followed by several years playing overseas before returning to the university to earn his MBA. He is a major donor to Athletics and the University.

His regular presence around the program, respect from the University community, and credibility as an athlete provide him with a voice of influence to men's basketball stakeholders. His participation in the process is somewhat risky because of his influence but ultimately the AD felt his presence would create a sense of investment in the next coach: something that never fully developed with the previous coach. The AD is also hoping that his participation in the process will lead to larger donations to support basketball in the future.

A former professional colleague of the Alum is a highly successful head coach at a smaller Division II college. They have stayed in-touch through the years, and would like nothing more than to see him be named head coach at the school.

The alum was a senior when the SWA was a first-year student-athlete and although they did not have a strong relationship at the time, they knew one-another and their relationship has strengthened since the SWA returned to their Alma Mater.

Institution #1 Spruce University

Type: School Size: Location: Academics: MBB APR/GSR: Religious Affiliation: Diversity Index: Conference: Average Attendance: Varsity Teams: Football: Program Resources: Cost of Living Index: Mascot: Public 21,000 Midwest – Urban Medium 934/70 None 0.54 High-Major (2-3 Bids) 4,287 23 (13 women; 10 men) Yes Medium (6 of 12 in conference) 71.64 Piney



A large land grant university located in the Midwest, Spruce University has begun the process of finding a new leader for its men's basketball program.

The campus is located in a relatively unattractive, moderately diverse urban center with typical large city amenities. While housing immediately proximate to the campus is affordable, few staff live in the area. However, real estate in neighborhoods with relatively easy commutes (public or private transportation) is exorbitant and currently out-of-reach for coaches, so the university is considering a proposal from the AD for a mortgage assistance program.

Enrollment has been slowly declining for the past decade and has brought greater scrutiny of the athletics financial support from the university as most academic units have been forced to cut budgets. A recent rash of racist vandalism on campus that was in adequately addressed by administration has had many civic groups call for a boycott of the university, putting further question marks on future enrollment, especially among students of diverse backgrounds. There is also public speculation the school will cut a number of varsitysponsored sports, so morale among many of the Olympic sports is low and impacting recruiting.

The university has experimented with remote-learning courses with some success and is developing a plan to expand online educational opportunities and degrees to offset declining enrollment. The implications of this strategic move on athletics are numerous, and will negatively impact both student attendance and the substantial student fees helping subsidize athletics' operations.

The men's basketball program is seen as a key asset in being able to establish Spruce's credibility as an athletic powerhouse. That being said, the program's budget and resources

are mid-level by conference standards (most money is allocated towards football first), the facilities are on the older end of the spectrum. The school is one of the few that still flies commercial to more distant opponents during conference play.

The program had been relatively successful under its former head coach, but not nearly to the level of a rival school in a more affluent part of the state. Spruce has won the conference regular season two of the last six years, although they had reached the NCAA tournament only once in that time, falling in the conference tournament finals twice. The program has the money to buy up to five games yearly, but continuing budget constraints may make home-and-home series more appealing, especially with the conference's initiative to raise the leagues NET rankings in hopes of garnering more at-large bids to the NCAA tournament.

While there was little desire to make a coaching change by alumni and key donors, athletics administration was quite aware that not doing so likely meant sacrificing their own jobs, while only delaying the inevitable. To the same end, they now need to ensure that the next coach they hire can get Spruce over the hump given the university's unique constraints.

Institution #2 Desert Valley College

Type: School Size: Location: Academics: MBB APR/GSR: Religious Affiliation: Diversity Index: Conference: Average Attendance: Varsity Teams: Football: Program Resources: Cost of Living Index: Mascot:

Private 3,900 Southwest – Suburban Strong 990/98 Catholic 0.19 Low-Major (1 Bid) 1103 16 (10 women; 6 men) No High (2nd of 10 in conference) 84.65 Scorpio



Desert Valley College – a private liberal arts college located in a charming Southwest city – is seeking a new leader for its men's basketball program.

While the cost of living is high, staff willing to commute longer distances can find affordable housing. However, driving time is time developing players so most coaches rent rather than purchase housing which also allows greater ease to leave for other jobs. Attrition, therefore, has been a problem not so much with head coaches but with assistants and high-quality support staff (trainers, strength coaches, academic counselors) who can't afford to live near campus.

The program has a long history of uneven results on the basketball court, with more than a decade since its last NCAA tournament appearance despite strong financial investment and community support. Because the academic reputation and value of the Desert Valley degree is so highly valued by student-athletes, few of them transfer out of the program. Moreover, academic standards don't make it easy to transfer into the program either, which puts greater pressure on the coaching staff's evaluation and recruitment of freshman talent.

Originally a nunnery turned women's only teacher's college, admissions at Desert Valley is somewhat of a challenge because of the narrow focus of the undergraduate curriculum without less rigorous academic majors. Thus, admitting at-risk student-athletes is not the issue but rather keeping them eligible is the challenge so coaches must highly scrutinize academic potential with low-academic-profile recruits. Often, highly recruited studentathletes who come to Desert Valley never fulfill their potential because they must compensate for their lesser preparation with more time spent studying, with tutors, re-

writing papers and in study hall: time their teammates and competitors spend practicing, watching video and lifting weights.

The school has little diversity, and mandates a number of religiously affiliated classes as part of its core-curriculum, which makes recruiting student-athletes from different demographics and backgrounds even more difficult. That being said, the campus is located in a downtown area that offers a great deal of amenities as well as entertainment options for students. Despite its strong academic reputation and religious affiliation, Desert Valley has a notorious reputation throughout the country as a party-school. There has been longstanding criticism by the media of the school's seemingly hypocritical behavior when it comes to its religious affiliation and the sometimes-outlandish behavior of its student body. This media spotlight has only grown brighter in the last year after the school was rocked by a major sexual assault scandal that led to the resignation of the previous President.

Thus far, a few of the teams within the department have established apparel sponsorship deals across brands but there is no all-school deal in place and the basketball program's deal has expired. There is hope that this hire might align with securing a significant partnership. Few of the basketball games in the past have been televised in any form until recently with livestream broadcasts produced by students in the university's journalism program. The previous coach openly labeled himself as an introvert, and would often find excuses not to participate in media opportunities and public appearances to promote the program and help drive much needed sponsorship revenue.

Institution #3 Bluewater A&M University

Type: School Size: Location: Academics: WBB APR/GSR: Religious Affiliation: Diversity Index: Conference: Average Attendance: Varsity Teams: Football: Program Resources: Cost of Living Index: Mascot: Public 7,500 Southeast – Coastal Low 945/68 None 0.73 Mid-Major (1-2 Bids) 2,325 19 (12 women; 7 men) No Low (10 of 14 in conference) 54.78 Great White



Located in the rural South, Bluewater A&M University is seeking a head coach for the men's basketball program after the sudden departure of their coach due to serious health concerns. The previous coach led the program for over 20 years with unprecedented success and an expectation that he would serve as "coach for life." Not only did he lead the program to numerous tournament appearances, but he has established a deep connection within the community and across the university.

The undergraduate population is economically, racially and regionally diverse. However, the local community is predominantly Caucasian with few businesses catering to individuals of color, thereby having negative implications on recruiting diverse student-athletes, coaches and staff. To make matters worse, the city in which the university resides was selected to host the national convention of a notorious white nationalist group during the upcoming fall semester. The university spent a great deal of resources lobbying against the event from happening, and has lost a great deal of credibility among alumni after its efforts failed.

Bluewater A&M has a poor academic reputation with a limited variety of academic majors and a high percentage of adjunct professors and graduate assistants teaching classes. There is currently no priority registration for student-athletes. Additionally, many labs are taught in the evenings, often conflicting with games, so it is difficult for men's basketball studentathletes to major in the sciences.

Because the school's alumni population is relatively small for a public school, there are fewer development prospects. Exacerbating the fundraising context is the school's historical mission as an Agriculture and Military institution: two professions not often associated with high compensation.

High School and Club basketball in the state is very talented but not deep, so better resourced and more prestigious programs in the region raid the top talent. In addition, the poor academic reputation of the school is most impactful locally where in-state prospects (and their parents) often read and hear about institution challenges through local media.

The previous coach had recruited well despite the challenges, typically finding studentathletes committed to graduation and longer-term athletic development, and the current roster is strong with indications that at least some of the student-athletes remain committed to the program.

There is a great deal of anxiety about whether or not this program can sustain the loss of this storied head coach, but renewed hope that a new, younger, coach can bring back excitement both on campus and in the community. It is critical for the new hire to establish trust within the community that they are an appropriate ambassador for the university at large. The athletic director is looking toward a shorter-term contract to ensure that the program can sustain some semblance of success with this hire prior to making a longer-term commitment.

Candidate #1

Josh Schertz

Title: School: Conference: Age: Head Men's Basketball Coach Lincoln Memorial University (DII) South Atlantic Conference 45

Education

B.S. Sociology – Florida Atlantic University M.A. Education – Lynn University



Coaching Experience

1998 - 1999	Florida Atlantic University (GA)
1999 - 2001	Lynn University (Asst)
2001 - 2003	Queens University of Charlotte (Asst)
2003 - 2008	High Point University (Associate HC)
2008 – Present	Lincoln Memorial University (HC)

Candidate Profile

Josh Schertz has proven himself to be one of the most successful coaches in the history of college basketball, accumulating an astounding 318-65 (.830) record over the last twelve seasons, including a record-breaking span of four straight 30-win seasons. A Florida native and four-time National Coach of The Year, Schertz spent five years on the Division I level before becoming head coach at Lincoln Memorial. Lauded for his work-ethic and tactical acumen, Schertz is an offensive minded coach whose teams take advantage of high player intelligence to play calculated, mistake free basketball. Over a dozen of the student-athletes Schertz has recruited to his current program have gone on to play professionally, including one of the only DII players to make an NBA roster in the last decade.

\checkmark Highly successful as a Division II head coach

\checkmark Unrivaled technical and tactical expertise

X Limited experience recruiting high-major talent

Candidate #2

Terry Johnson

Title: School: Conference: Age: Men's Basketball Assistant Coach Ohio State University (DI) Big Ten Conference 46

Education

B.A. Liberal Arts – Purdue University, Fort Wayne M.A. Sports Admin – Western Kentucky University



Coaching Experience

1997 - 1999	Purdue University Fort Wayne (Asst)
1999 - 2001	Indiana Institute of Technology (Asst)
2001 - 2003	Lincoln Trail Junior College (Asst)
2003 - 2004	Auburn University (Admin)
2006 - 2007	Purdue University Fort Wayne (Asst)
2007 - 2017	Butler University (Asst)
2017 – Present	Ohio State University (Asst)

Candidate Profile

Terry Johnson has more than twenty years of experience as an assistant at all levels of college basketball, helping Butler and Ohio State reach an incredible 10 of 12 NCAA Tournaments, while accumulating a 17-10 postseason record, including back-to-back Final 4 appearances with Butler. An Indiana native and former college basketball and baseball player, Johnson offers a strong player development background with successful coaching experience at institutions with varying resources. Highly intelligent and analytical, Johnson is a defensive specialist whose teams play a fast-paced style that maximizes speed and athletic ability while minimizing size disadvantages. He has a history of identifying and developing under-recruited talent into top-tier performers, helping produce multiple NBA players.

\checkmark Track record of recruiting blue chip talent

✓ Elite player development acumen

X Lacks head coaching experience

Candidate #3

Robert Jones

Title: School: Conference: Age: Head Men's Basketball Coach Norfolk State University (DI) Mid-Eastern Athletic Conference 41

Education

B.A. Business Management - SUNY New Paltz

Coaching Experience

2001 - 2002	Bard College (Asst)
2002 - 2004	SUNY New Paltz (Asst)
2004 - 2007	St. Mary's High School (HC)
2007 - 2013	Norfolk State University (Associate HC)
2013 – Present	Norfolk State University (HC)

Candidate Profile

A native New Yorker, Robert Jones has established himself as one of the most consistent winners in Division I basketball, achieving a .750 win-percentage in conference play – good for 6th nationally among active head coaches. His teams are known for being notoriously difficult to prepare for, running a wide range of offensive and defensive sets designed to confuse opposing teams and create turnovers. Jones is perhaps best known for orchestrating monumental postseason upsets of high major programs, including Norfolk's wins over No. 2 seeded Missouri in the NCAA Tournament and No. 1 seeded Alabama in the NIT. A tireless recruiter and talent evaluator, Jones has a long history of identifying diamonds in the rough, including a National Player of the Year and NBA draft pick.

✓ Consistent winner as a Division I head coach

\checkmark Proven ability to succeed with minimal resources

X Limited geographic and institutional experience



Discussion Questions

In your groups, please discuss and develop answers to the following questions:

Managing the search process

- Given the construction of the search committee and the characteristics of its members, what are the potential challenges and dynamics that the Athletics Director must manage during the search process? How are these dynamics best managed?
- Should the Athletics Director use a search firm? Why or why not? Would the use of a search firm vary depending on each institution?

Selection of a candidate

- As the athletics director at each school, what line of questions would you develop for each candidate?
- Which candidate should be the first choice for each school, and why?
- After making a decision about which candidate should be hired, what is the best communications approach for announcing the hire? How should the media be involved? How should communications with the president, other coaches, and major donors be handled?

AthleticDirectorU Coach Hiring Canvas

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Strategy	Alignment	Leadership	Qualifications	Interview Metrics
	U	-	C	
Has the candidate articulated	What are the candidates	Does the candidate seek input	Does the candidate have a	How were the candidate's
a strong vision for their	values?	from his players when	track record of success as a	communication skills during
program? Do they have a		deciding the direction of the	head or assistant coach?	the interview?
roadmap to get there?	How well do those values align	program?		
r - 8	to the University mission $\check{/}$	r o	What is the candidate's	Did the candidate demonstrate
How will they build their	objectives?	How does the candidate	tactical expertise when it	strong teambuilding and
staff?		propose team issues will be	comes to on-court coaching?	interpersonal skills?
	How well do they align to	resolved (collaborative vs.	C	-
How do the individuals they	athletic department?	insular)?	What is the candidate's	Did the candidate show an
plan on hiring address their	-	,	technical expertise when it	understanding and
strengths and weaknesses?	How integrated or isolated is	How will they determine the	comes to developing players?	appreciation for the program's
	the student-athlete	strongest motivators for each		operating capabilities and
What is their approach to	experience they create for	player?	Do they have proven	constraints?
handling student-athlete	their athletes?		recruiting success (regional,	
development for mental		What kind of discipline do	high school vs. junior college	Did the candidate identify a
health, education, post	How well does this align to the	they favor? Do they have a	vs. transfers)?	unique value proposition?
basketball careers?	AD's vision?	disciplinary system they	-	
		intend to implement?	What are their connections to	Did the candidate, through his
Who does the candidate view	Does the type of student-	_	the program (e.g. former	answers, demonstrate strong
as key stakeholders to their	athlete they have experience	Who has jurisdiction over	assistant, alumni, state	self-awareness of his strengths
success? How do they	recruiting fit the values of the	behavior away from campus?	resident)?	and weaknesses as a leader?
prioritize those individuals?	university?	What is it?		
			Does the candidate have	Was the candidate able to
What style of play does the		What will leadership roles	experience in programs with	provide a clear and compelling
candidate intend to use? How	What does the candidate and	look like (i.e. captain) and	similar constraints and	vision for the program
does it compare to the rest of	their family value in their	what decisions will they be	resources?	
the conference? To the	community? Is it present	allowed to make?		
previous staff?	here?			

External Considerations

What are the desires of key donors and alumni? Is the fan base restless?

Does this hire need to generate positive media attention? Will it?

What level of presence does the university community expect from candidate?

Is this a stepping stone job/ stretch job/ dream job/ retirement job?

Does the candidate have strong name recognition among key stakeholders?

What is the perception of the program in the college coaching community?

Internal Considerations

What is the state of the program financially overall?

How competitive is the compensation package for candidate and assistants?

Is there pressure to win now versus long term?