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Passing the Leadership Baton

Preparing for Presidential
and Board Chair Transitions

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Preparing for Leadership Transitions: Overview

- The reasons for leadership transitions of President's and Board Chairs.
- Preparing for transitions – processes and policies.
- Designing the job descriptions in advance - taking into account new opportunities & challenges.
- The search & selection process for new leadership.
- Measuring and supporting the effectiveness of Presidential and Board Chair leadership.

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Leadership Transitions of President's and Board Chairs on the Rise

- Aging out of current generation of leaders.
- Demands of leadership requiring different skills and expertise.
- Stress on leaders increasing on multiple fronts:
 - Constituency dissatisfaction with leaderships' positions and priorities
 - Perceptions of mission drift and compromise
 - Fiscal realities impacting operational viability.
- Lack of capacity to ensure assurance that missional promises are achieved.
- Governance confusion/conflict about who is in-charge of what and when and how to determine the most appropriate accountabilities and then measure performances meaningfully.

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Preparing for Leadership Transitions – Processes, Practices and Policies

- Embracing leadership transitions as more imminent and necessary than anticipated.
- Addressing policies, practices and processes well in advance of the need for transition management:
 - Sometimes awkward as current leaders wonder if a not-so-subtle message is being sent.
- Ensuring that an effective annual evaluation of both the CEO and Chair are identifying strengths and needs.

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Focus on Board Chair Transitions Needed

- There is much in the literature and our ABHE data bases on best practices for evaluating and planning for executive leadership transitions. (Insert link)
- However, there is not as much focus on the effectiveness of the Board Chair, essential qualities and characteristics of successful chairmanships and the process for selecting the Chair.
- Few CEOs understand how to work with their Chair and vice versa.
- As a result, this workshop will give primary attention to the role, responsibilities, evaluations and planning for the transitions of the Board Chair.

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Unhealthy Chair/CEO Leadership – Signs of Trouble

- Board members feel excluded. Decisions on important issues are reported to the board after the fact, without prior involvement beyond the chair.
- Decisions are made at the last minute. The president and board chair rush to decisions, and don't want to slow things down by convening the executive or other committee or waiting for or calling a special board meeting.
- The chair is surprised by actions taken by the president and isn't informed in advance about key personnel changes, new partnerships, or other significant decisions.
- The chair speaks for the board, even when the board hasn't conferred and expressed its decision or will. (While the chair should be recognized as the voice of the board, the chair has no more authority than any other member; board authority lies in the collective body. The chair should not act or speak for the board unless designated to do so.)
- The chair inserts him or herself into decisions that are clearly the president's, calls the president too often, or demands information other board members or committee chairs do not receive. (The chair is not the president's boss.)

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Healthy Relationships Between CEO and Chair

- The president and board chair have a regular time to talk—weekly, monthly, or some other interval.
- Conversations happen as needed, when issues arise, and the president and board chair make an effort to take the other's call. They trust that it must be important and respect each other's time.
- The president adheres to the treaty of "no surprises" when it comes to the chair and the board. The president makes sure the chair, and all board members, are informed directly and don't read about emerging issues in the newspaper. There's a plan in place for sharing information quickly, if the need arises.
- The chair serves as counsel to the president, but not decision maker for the board. The president and chair confer about when and how to bring matters to the board in a timely way.
- In selecting the board chair, the board considers the attributes needed to fulfill the role, with particular focus on the relationship with the president.

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Evaluating the Board Chair

- Committed to the Mission and Values of the institution.
- Demonstrates awareness of effective Board leadership skills.
- Facilitates the Board meetings effectively addressing the most important elements of the agenda.
- Ensures that the voice of every Board member is appropriately heard.
- Has an effective working relationship with the CEO.
- Is strategic in helping identify and onboard new Board members as well as effectively uses the skills and interests of current members.
- Provides, by example and instruction, spiritual leadership for the Board's sacred calling to steward well the mission.

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Selecting an Effective Board Chair

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- Board chairs are selected for a variety of reasons: stature, trust, leadership skills, external connections, length of service, gubernatorial influence, personal philanthropy, and others.
- But such criteria may not be what's needed in this era of constant change. A high-performing board requires a leader who:
 - supports and facilitates a model of strategic governance,
 - develops an essential and candid relationship with the chief executive officer,
 - has the respect of his or her board colleagues,
 - understands and respects academic culture, and
 - ensures that the full board is focused on issues that matter.
 - is a mature, Christ-centered and Bible-anchored follower of Christ
- The board chair and president must have a relationship that allows for candor yet is also mutually supportive.

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Essential Attributes of an Effective Board Chair

- A sense of partnership with the chief executive.
- Experience leading voluntary boards of complex organizations.
- An understanding of the challenges and opportunities facing the institution.
- A willingness to focus the board and its members on issues that matter rather than those that are neither the province of the board nor necessarily the most important strategic challenges.
- A familiarity with the interests of the institution's internal and external stakeholders, and the ability to represent the board to those groups.
- A readiness to be the voice of the board as both an advocate and a storyteller to key external constituents, in coordination with institutional leadership.

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Discussion of Issues in Board Chair Effectiveness and Transitions

- What elements of this presentation are most relevant to your Board Chair evaluations and selection?
- What do you believe to be the most significant indicators of a well functioning Chair and why?
- What would be the most important attributes of your Board Chair as you look to the future of your institution's challenges and opportunities?
- What other elements of Board Chair selection and evaluation have we not addressed?
- Note that the ABHE Resource Library has a wealth of materials and templates on leadership transitions that will assist you developing and supporting an effective Chair of the Board.

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Additional Resources

In addition to the resources on the ABHE website (link), please know I am available to answer questions as well as provide a copy of the power points for this workshop by contacting me at:
leadershiptlt@gmail.com

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