ABHE Annual Conference 2026: Thursday afternoon

Conducting a Meaningful Presidential Review

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Overview: Presidential performance reviews are more than a governance obligation—they're a strategic opportunity to strengthen leadership, clarify institutional priorities, and foster mutual trust. This workshop equips college trustees with practical tools and proven approaches for conducting a thoughtful, mission-aligned evaluation of their institution's president.

- A review process that is both respectful and rigorous
- Setting meaningful benchmarks rooted in the college's unique context
- Use feedback to encourage growth rather than merely assess performance.

Leadership Challenges and Opportunities in Times Like These

- Accelerating turnover in presidential leadership causes
  - Increasing complexity of managing higher education institutions
  - Fracturing of stakeholders over issues both on and beyond the campus
  - Tensions between missional fidelity and operational viability
- Governance confusion and power struggles around institutional priorities creating unclear performance expectations for presidential leadership

Boards Must Develop Meaningful Evaluations with Clear Parameters and Accountabilities

- Biblical mandates for assessment – we only have authority when we are under authority
  - The Centurion's understanding – Mt 8:5-13 – evidence of real faith
  - The Jerusalem Council's role in appointing, anointing and guiding
- Whatever is not prescribed the president will assume is permitted
  - Ensuring policy frameworks within which your president is to operate
  - Having actionable data and regular reporting that measures effectiveness as well as efficiencies
- Important for the Board to evaluate the president annually with specific attention on the agreed upon strategic priorities on which the President will focus
- A more comprehensive evaluation seeking tailored input from appropriate stakeholder groups should be conducted every three years and/or before contract renewal using an external evaluator and related tools.
- Note samples of policies and practices, annual evaluations and strategic priorities in the attached resources
- Create and support, in concert with the president, a professional development plan that addresses growth areas. Pay attention to the president's personal and family needs in each evaluation and provide support as mutually agreed.

Identifying Presidential Competencies and Capacities

- Governing Boards need to have clarity on the essential roles and responsibilities of presidential leadership
    - Guarding missional fidelity
    - Guiding and guaranteeing operational viability
- Essential competencies for leadership in times like these
    - Today's president's need to:
        - The ability to form, evaluate and facilitate a competent leadership team
        - Strategic resource management,
        - Openness to accountability,
        - Entrepreneurship,
        - A commitment to collaboration and appropriate stakeholder involvement,
        - Change management,
        - Effective communications,
        - Cross-cultural and globalization awareness,
        - Strong Board relationships and
        - A deep passion for the core values and stated mission of the organization. (Adapted from "Turnover: Selecting the Next Generation's Presidents", Change Magazine, September-October 2010).
    - *NOTE: Character is a better predictor of executive leaders' success than credentials and interview performance*.
        - *a mature capacity to lead* that puts other priorities ahead of personal needs for approval and success – in essence a "servant leader" motivation that seeks the good of the organization and others even if at great expense to the self.
        - Such leaders discipline themselves to pay attention to their *discomfort zones* recognizing that a significant aspect of effective leadership requires a willingness to work outside of preferred or learned approaches and styles.
        - The suggestion here is that the next generation of CEO's must be driven more by the needs of the people and the organizations they serve rather than their own needs.

Linking Evaluations to the Job Description Focused by Current Strategic Priorities

- Focused on essential functions for the most pressing and immediate challenges and opportunities facing the institution
- Development of annual strategic priorities that are actionable and measurable – example in resources
- Note samples of job descriptions, policies related to evaluations and a template for strategic priorities in Resources

The Myth of the Super President – Leader for All Seasons and of All Things

- No longer possible for a single individual to have all the skills and experiences needed in times like these.
- The "office of the president" model with a high function team committed to the mission, each other and equipped for leading their units with missional fidelity and operational viability
- Assessing the President's ability to build effective teams to allow the president to focus time, energy and talents on the most pressing strategic priorities that address mission critical opportunities and challenges.

Summary on Effective Presidential Evaluations

- The best practice is for the Board to develop a list of the organizational-specific skill sets, corporate culture distinctives, leadership style and executive experiences required of the next leader.
- In annual evaluations it is essential that the most relevant and strategic elements related to the current year's challenges and opportunities be the focus of the assessment.
- Important for the President to be given opportunity to evaluate the Board's effectiveness as part of the annual review process
- Every organization has a distinctive climate and culture that leadership must understand and embrace.
- Whether it is a theological underpinning, operational style, specialized service niche or a myriad of other organizational distinctives, Boards must be able to understand these factors, delineate and then apply them for evaluations to be meaningful and effective in these times where missional fidelity and operational viability have never been more challenging.

ADDENDUM RESOURCES: See attached documents

1. Sample President's Position Description
2. Sample President's Evaluation Policies and Procedures
3. Two Sample Trustee Evaluation of President Forms
4. Sample of President's Annual Strategic Priorities

For a copy of these notes and sample resources and/or a confidential conversation about your needs for effective presidential reviews, please email me at djgyertson@gmail.com

SAMPLE UNIVERSITY PRESIDENT 'S POSITION DESCRIPTION

Position: President

Organizational Relationship: Reports to the Board of Trustees

Position Status: Exempt, Administrative

Position Summary: The President shall be the Chief Executive and Administrative Officer of the University. The President shall exercise such direction and supervision of the University as will promote its effectiveness within the purpose, policies, and precepts established by the Board of Trustees.

Duties & Responsibilities:

- Shall have the power to confer earned degrees when requirements have been fulfilled and to confer honorary degrees when deemed appropriate.
- Shall have the responsibility for the initiation of plans for education programs, services, public information and other activities to increase the college funds, facilities, equipment, and for financial receipts and expenditures in accordance with the Bylaws.
- Shall be an ex-officio member of the Board of Directors without power to vote.
- Shall be responsible for hiring, supervising and dismissing all officers, faculty and employees of the university.
- Shall appoint such committees as the President deems necessary for the welfare of the university and may assign such tasks and responsibilities to committees, faculty and administrative personnel as would facilitate the business of the university
- Shall be responsible for performance evaluation of all employees of the university.
- Shall prepare or cause to be prepared and presented to the Executive Committee, a complete and detailed annual budget for the operation of the university for the next fiscal.
- Shall in the exercise of all the powers and in the discharge of all the duties be responsible alone to the Board and shall be the official medium of communication between members of the Board and the faculty or any individual university personnel, group or committee.
- Shall have the general charge of the intellectual, religious, moral and social life of the students and shall be final authority of the internal affairs of the university, including disciplinary cases.
- Shall have the authority to sign checks for the Corporation and to execute faculty and staff contacts, deeds, notes, mortgages, and other instruments of the corporation.
- Shall make reports of the total operation and the state of affairs of the university to the Board at its meetings.
- Shall report directly to the Chairman of the Board of Trustees on all matters not specifically covered.

Employment Standards:

QUALIFICATIONS: To fulfill this role successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and Experience: Academic credentials sufficient to engender respect from the academy and community at large. Terminal degree is preferred. Senior-level administrative experience, preferably including experience in a comprehensive institution of higher education.

Knowledge and Skills: Academic leadership, personnel supervision and management. Commitment to Christ, passion for higher education and helping students reach their educational goals. Excellent interpersonal, presentation, and telephone skills. Must be self-directed and take initiative. Excellent written communication skills, including grammar and spelling. Proficiency with Microsoft Office Applications (Word, Excel, Outlook, Access) and database management software.

Language and Communication: Ability to read, analyze, and interpret common journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, donors, constituents, regulatory agencies, or members of the business community. Ability to write speeches and articles for publication that conform to prescribed style and format. Ability to effectively present information to top management, public groups, and the Board of Trustees.

Mathematical: Ability to work with mathematical concepts such as probability and statistical inference. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

Reasoning: Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical and diagram form and deal with several abstract and concrete variables.

Mental Demands: The ability to understand the many functions of the department and to keep them moving forward. The ability to plan, organize, and develop programming for fulfilling the plans.

Visual Demands: Visual Demands: The visual ability to read hard-copy and computer-generated reports, letters, University publications, professional magazines, and journals.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate.

Character: Must be of unassailable Christian character and be actively involved in a local church.

Sample President's Annual Evaluation Policies & Procedures

Performance Review Policy

The president's annual performance evaluation and salary review take place at the spring board of trustees meeting and is conducted by the executive committee of the board under the direction of the board chair. Prior to the meeting, the board chair distributes the evaluation form to the members of the board who return the completed forms and comments to the board chair. The results are summarized and reviewed with the president during an executive session.

Salary Review Policy

The executive committee acts on behalf of the board to conduct regular performance evaluations and to establish compensation for the president. The executive committee meets in executive session and uses comparative data on presidential salaries of peer institutions. The salary and benefits determined are included in the annual budget as approved by the full board of trustees at the regularly called meeting.

The president is not present at the meeting of the executive committee for the discussion on the salary issue. No participant in the process may have a known conflict of interest. The procedures followed by the board and its committees are done in accordance with the requirements of the Internal Revenue Code §4958.

President's Compensation Resolution

The executive committee of the _____ Board of Trustees acts on behalf of the board to conduct regular performance evaluations and to establish compensation for the president. The executive committee met in executive session on _____ and used comparative data on presidential salaries as prepared by the _____. The salary and benefits determined are included in the annual budget as approved by the full Board of Trustees at the regularly called meeting on _____.

The President was not present at the meeting of the Executive Committee for the discussion on this issue. No participant in this process had a known conflict of interest. The procedures followed by the board and its committees were done in accordance with the requirements of the Internal Revenue Code §4958.

Pursuant to the review and discussion, the Executive Committee established and adopted a compensation plan for the president that includes the following elements budget adopted by the Board of Trustees.

Annual cash compensation of $_____ Medical Insurance Coverage

Retirement contribution of _____

College vehicle, including gas, insurance and maintenance for exclusive use by the president

Board of Trustees

Annual President Evaluation

Date: _____

In his book *The Unconscious Conspiracy or Why Leaders Can't Lead*, Warren Bennis identified eight specific skills of prime importance needed for administrative effectiveness of academic leaders. Listed below are those eight skills. Please indicate your evaluation of the President in each of these areas. (5 = Strongly Agree, 1 = Strongly Disagree, 0 = Don't Know)

_____ 1. Peer Skills: The ability to establish and maintain a network of contact with equals.

_____ 2. Leadership Skills: The ability to deal with subordinates and the kinds of complications that are created by power, authority, and dependence.

_____ 3. Conflict Resolution Skills: The ability to mediate conflict, to handle disturbances under psychological stress.

_____ 4. Information Processing Skills: The ability to build networks, extract and validate information, and disseminate information effectively.

_____ 5. Skills in Unstructured Decision-Making: The ability to find problems and solutions when alternative information and objectives are ambiguous.

_____ 6. Resource Allocation Skills: The ability to decide among alternative uses of time and other scarce organizational resources.

_____ 7. Entrepreneurial Skills: The ability to take sensible risks and implement innovations.

_____ 8. Skills of Introspection: The ability to understand the position of a leader and his impact on the organization.

ADDITIONAL COMMENTS:

1. What suggestions do you have which might assist the President in improving performance?

2. What, in your opinion, is the President's greatest accomplishment over the past year

3. What do you see as the President's biggest challenge for the next five years?

Additional/Alternative President Evaluation Questions

Please rate your agreement with the following statements. Comments may be added as needed.

(5 = Strongly Agree, 1 = Strongly Disagree, 0 = Don't Know)

_____ **The President has clearly articulated a strategic plan that is closely aligned with our mission/vision statement.**

Comments:

_____ **The President is leading our college on a path that optimizes progress toward mission/vision achievement.**

Comments:

_____ **The President is an effective communicator, aptly representing our college to key constituents and stakeholders.**

Comments:

_____ **The President fosters healthy and productive partnerships with stakeholders and other institutions.**

Comments:

_____ **Our college is administratively stable.**

Comments:

_____ **Our college is fiscally stable.**

Comments:

_____ **The President has fostered a culture of discipline among the faculty and staff.**

Comments:

_____ **The President provides leadership to the staff including professional development, communication skills, and product/program implementation.**

Comments:

_____ **The President builds teamwork among colleagues and the staff.**

Comments:

_____ **The President keeps current regarding trends and issues in higher education.**

Comments:

_____ **The President has a clearly articulated plan to lead our college to modern campus facilities that are both functional and appealing.**

Comments:

_____ **Our college is compliant with the requirements of appropriate accrediting institutions.**

Comments:

_____ **Our college has a strategic budget that is leading us to mission/vision achievement.**

Comments:

_____ **The President assures the moral and ethical integrity of the campus community.**

Comments:

_____ **The President consults with the appropriate people, gathers the needed information, and considers alternatives prior to making decisions.**

Comments:

_____ **The President has a genuine concern for the students at our college.**

Comments:

_____ **The student body has a high opinion of the President.**

Comments:

_____ **The faculty and staff have a high opinion of the President.**

Comments:

_____ **The President sets a solid example of a devoted Christ-follower in every facet of life.**

Comments:

President's Strategic Priorities for Year _____

The Annual Strategic Priorities Plan serves as a guide to assess leadership in the respective operational areas. It is prepared by the President in consultation with his/her leadership team. It is then reviewed and affirmed by the governing Board as the focus for the efforts and annual evaluation of the president. The priorities identified should include specific action steps with key performance indicators based on measurable results. Longer term priorities are directly related to initiatives that are part of the university's Strategic Plan and are included for discussion purposes during the annual review. The Professional Development Plan reflects activities for personal growth that take into consideration the President's career goals and physical, emotional, family and spiritual well-being.

Strategic Priorities to be Accomplished this Year: (up to a maximum of ten)

- (Priority) to be achieved by _____date.
    - Action Steps
- Etc.

Board Prescribed Accountabilities to Support and Guide Priority Achievement:

- What policies will the Board expect the President to follow in achieving the goals? How will the Board determine if these policies are effective and followed?

Key Performance Indicators to Track Progress (quarterly/semi-annually):

- Related to each priority above with specific reporting schedule of measurable progress and results.

Long Term Priorities that Advance the Vision of the University:

- Usually tied to a current strategic plan with specific strategies and measurable outcomes identified

Personal Professional Development Plan:

- Areas where the president is seeking/needing additional development along with specific plans such as coaching, workshops, formal courses etc.
- Note also any specific areas of personal and family support desired.