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# Oregon Institute of Technology

## Evaluating Presidential Leadership

# Fundamental Board Responsibility

# Effective Governing Boards\*

- Select a chief executive to lead the institution.
- Support and periodically assess the performance of the chief executive and establish and review the executive's compensation.

\*From "Effective Governing Boards: A Guide for Members of Governing Boards of Public Colleges, Universities and Systems." AGB, 2010

# High-Performing Boards

- Engaged and informed – understand and respect differences between governing and managing.
- Supp –

# Evaluation of Presidential Leadership

Annual  
Comprehensive

Basic purposes are the same. The procedures are complementary. Periodic comprehensive assessment builds on the annual process.

# Principles of Presidential Evaluation

1. Criteria for assessment should reflect dimensions of leadership that the board and president believe are most relevant in advancing the university.
2. Evaluation should be based on goals, expectations and metrics that have been jointly agreed to by the board and the president.
3. In evaluating presidential effectiveness, the board is implementing its responsibilities and fiduciary duties of active oversight.

# Multiple Purposes

1. Contributes to developing the president's effectiveness and the institution's success.
2. Deepens the relationship between the board and the president; builds the partnership.
3. Expands the board's knowledge of the presidency.
4. Provides a way to monitor the institution's progress in meeting strategic goals.
5. Fulfills the requirements for institutional accreditation.

# Annual Evaluation of Presidential Leadership

- Enables president to improve and strengthen performance.
- Provides an opportunity to re-set mutually agreed-upon goals.



# Comprehensive Evaluation of Presidential Leadership

- Increases knowledge about the work of the president from diverse sources, deepens understanding on complexity of the presidency.
- Provides way to monitor the university's progress in achieving strategic goals.
- Synthesizes significant institutional documents and improves on-going strategic discussion.
- Serves as a test for emerging strategic goals and future priorities.
- Strengthens president and board leadership.





# Characteristics of a Comprehensive Evaluation of the President

Assesses quality of “board-president” relationship and reveals levels of communication and mutual support.

- Provides for major areas to be assessed and includes evaluations from participants about importance of topics.
- Provides flexibility to gain information about key focus areas as well as emerging topics.
- Synthesis of information can be supplemented by qualitative and quantitative information.
- Includes introspection (self-assessment) and accountability.
- Requires candor and confidentiality.
- A best practice—not a response to a problem.

# Leadership Themes Assessed

- Strategic leadership; visioning
- Educational/academic leadership
- Management
- Financial leadership
- Fund-raising
- External relations
- Board relations and governance
- Personal characteristics and values
- Summary Opportunities: Major accomplishments; most important advice, priorities going forward

# Policy Development: Open, Transparent, Inclusive

Who participated? 43 individuals were interviewed

Trustees

Executive team and other senior administrators

Faculty Senate Executive Committee

Members of Administrative Council

Members of ASOIT

Members of the Foundation Board

# Stakeholder's Views

The context matters. This has been a year of great change and transition.

Stakeholders are seeking clarity about the role of the president and about OIT's vision and strategic directions.

Stakeholders understand the fundamental board responsibility for conducting an annual evaluation.

There is strong interest in a periodic comprehensive review, but there are different perspectives about the value of a comprehensive review at this time.

# Stakeholder's Views

Regarding a comprehensive review, stakeholders see the value but have different views about timing.

Stakeholders did not have an opportunity for input when the assessment was conducted by the system and now have an opportunity with this board.

The majority of stakeholders believe this is not the appropriate time to conduct a comprehensive review because it is still a time of transition.

Some expressed the hope that they could have some input (" maybe a 180 rather than a 360" ).



# Stakeholder's Views

What should be assessed?

LEADERSHIP

COMMUNICATION

MANAGEMENT

FINANCIAL STRATEGY

# Stakeholder's Views

LEADERSHIP—examples of expectations:

Develop and promote a clear vision for the future—use an inclusive process—

# Stakeholder's Views

COMMUNICATION—examples of expectations:  
Articulate the vision with passion and enthusiasm.  
Explain links between strategy, academic plans, facilities, etc.  
Be visible and accessible; build relationships every day.  
Project openness and honesty—communication is not pr.  
Create a culture of trust—"When there is no trust, you can never be transparent enough."  
Be a good listener--look for ways to encourage genuine dialogue.  
Be connected to the community.

# Stakeholder's Views

MANAGEMENT—examples of expectations:

In addition to developing strategic directions, the president has to implement plans/actions to execute on strategies.

Develop a team and invest in their success.

Be clear about expectations—what are we empowered to do?

Hold people accountable to achieve their goals.

Be decisive. Move forward on commitments.

Be visible and accessible—be a “hands-on” manager.

# Stakeholder's Views

FINANCIAL STRATEGY  
OPERATIONAL  
MAINTENANCE

APPROPRIATE

# Stakeholder's Views

PERSONAL CHARACTERISTICS—examples of expectations:

Integrity

Work ethic

Good listener

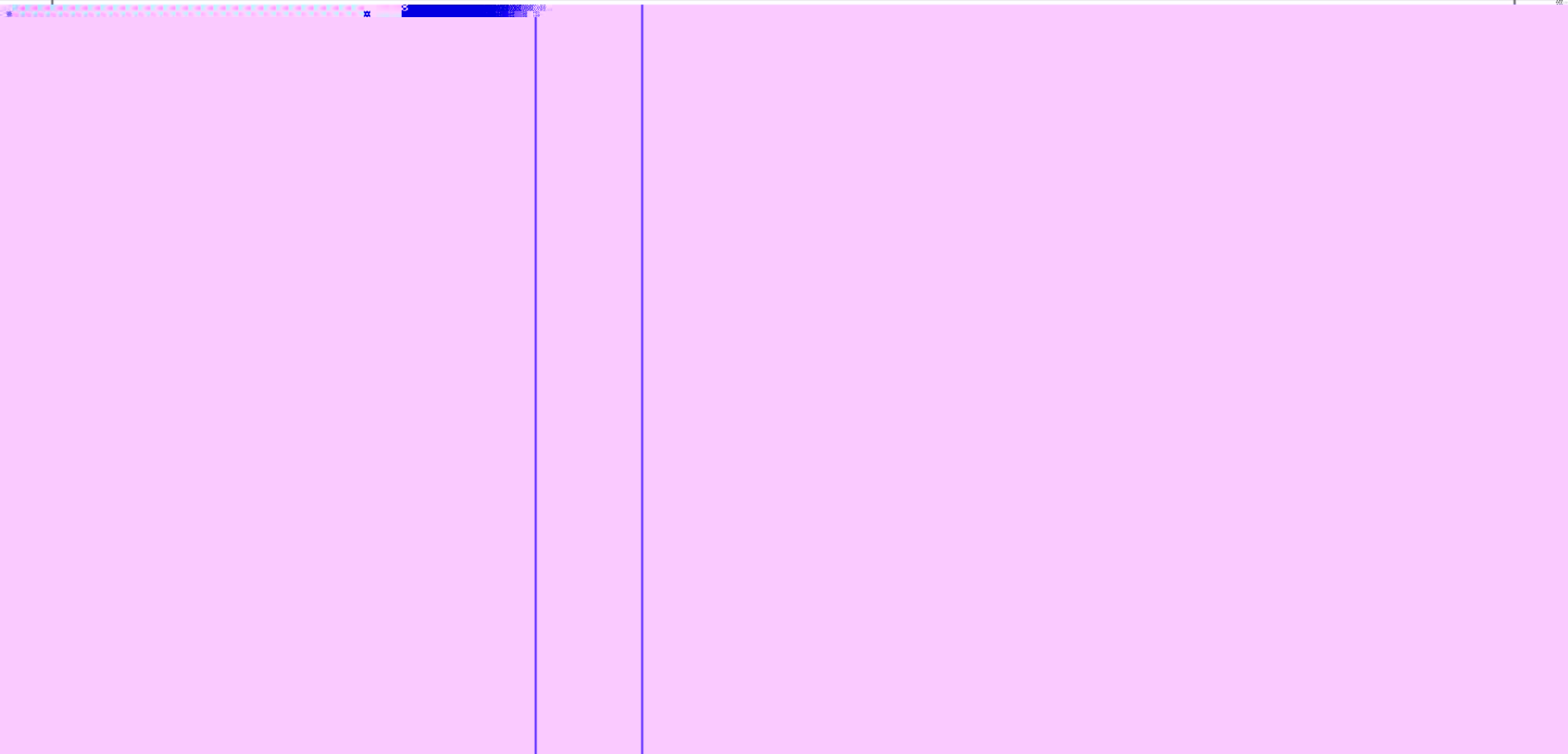
Embrace diversity and inclusion

Knows how to influence

Has a collaborative, inclusive and transparent style

Personal commitment to the institution

Priorities for time—how you spend your time signals what is important



# Resources

1. [Introduction to the History of the United States](#)

2. [American History 101](#)