

President's Evaluation Process

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In many schools, the evaluation of the president is considered the board's most important single task. Often boards are reluctant to give meaningful evaluations to presidents, and even when lay presidents are hired the board can be out of the habit. It is critical that the board provide the president with both formative and summative evaluations. How this is done should be thought through and understood in advance by both the board and the president. The components of the summative, or annual, evaluation are outlined below. Formative evaluations can consist of quarterly check-ins with the Chair or Executive Committee and should help both prepare for the annual evaluation. Both formative and summative evaluations are an important part of the *Chain of Care* (see *Managing for Mission*, p93-96).

The Summative Assessment of the President

The summative assessment will be used to determine contract renewal, in some cases compensation, promotion and performance improvement plans. It needs to give the president honest feedback on his or her performance and should never be inflated to "improve the morale" of the president. Generally, the summative evaluation is administered by a small Evaluation Committee (eg: board officers) and shared with the rest of the board in executive session.

The summative assessment, or annual evaluation, for the president should consist of the following components:

1. **A review of annual goals.** If these goals have not been set, then in the first annual evaluation, as with each subsequent annual evaluation, goals will be set for the following year. The annual goals are the most critical piece because they assure that the president is focusing his or her efforts on what is most important to the school. They will generally be proposed by the president, as a response to the school's [strategic plan](#), or absent that, any current board approved goals for the school. They are most beneficial if they can be put in measurable and time-bound terms, so that it is clear to both the board and the president whether there has been progress. While other goals may be listed and discussed, there should be a group of no more than six goals which are identified as the basis for the summative assessment.
2. **A self-evaluation.** This should include the president's own assessment of progress on his or her annual goals, reasons for success or shortfall, and learnings. It can also include a reflection on other important accomplishments and events during the year, but this should not preempt an honest assessment of the goals set for the year.
3. **A 360 degree survey.** This is a simple survey with both multiple choice and open-ended questions sent by the Board Chair to all board members, and a representative sample of other administrators, of faculty and staff, of volunteers, donors and alumni. The 360° survey should not

be anonymous to the Evaluation Committee, but comments and ratings are not shared by name with the president. The Evaluation Committee and the president must remember that the 360° survey is not itself the evaluation. It is merely input to the evaluation being done by the board's Evaluation Committee (as well as helpful feedback to the president.) For instance, if a faculty member gives a low score to the president on listening, and references an adverse decision, this should not automatically be seen as a problem. The board may actually commend the president for the courage to make an adverse decision. Used properly, the 360° survey gives the board an opportunity to help the president move beyond just trying to make people happy. (Click [here](#) to request a free sample 360° survey for the president's evaluation.)

4. **Evaluation by Job Description.** This involves a discussion of each responsibility listed in the job description, followed by an evaluation by the Evaluation Committee for each one. I prefer a simple scoring of: 1) doesn't meet our expectations; 2) meets our expectations or 3) exceeds our expectations. This is perhaps the least important of the four elements of the Annual Evaluation, because it is static and often doesn't get at what was most important in a given year. But if there is time, it provides helpful feedback from the Board to the president on how he or she is doing in relation to their expectations. It is also a good time to reflect on whether the job description still accurately reflects the Board's expectations and revise it if it does not. In the first year, if goals had not been set, then it will be important to do the job description evaluation.

The Evaluation Committee should meet with the president to review the results of these four components. The chair of the Evaluation Committee (generally the Board Chair) then prepares a summary evaluation citing data from the components, with copies going to the president, the president's personnel file and the rest of the Board. In addition, the Evaluation Committee should make a report and answer questions about the evaluation during an executive session of the Board. The president may be present for some, all or none of this presentation, but it is generally best to have the president present at the beginning to answer questions, and then be excused so the Board can have a candid conversation about the president's performance.

Managing for Mission also has a downloadable list of questions for the President's Evaluation, which you can receive by clicking [here](#).