

Pearl Meyer

Beyond the Metrics

Building a Thoughtful Evaluation Process for
Presidential Performance & Evaluating
Leadership for Sustainability

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October 2025

Today's Agenda

- 01 Context for Today's University and College Presidents
- 02 A Comprehensive Evaluation Framework
- 03 Designing the Evaluation Process
- 04 Roles in the Process
- 05 Key Takeaways and Q&A

Context: The Leadership Challenge

Navigating Uncertainty

- + We gather today at a pivotal moment for private higher education. The landscape is shifting beneath our feet—demographically, financially, and reputationally.
- + The traditional model of our institutions is being tested by:
 - Declining enrollments
 - Intensifying competition
 - Greater scrutiny from accreditors and legislators
 - A growing demand for measurable return on educational investment
- + At the same time, we are called to **lead transformative initiatives** without compromising the mission-centered values that define our sector
 - Growing revenue through new programs
 - Expanding access and equity, integrating technology
 - Enhancing institutional resilience
- + These are not small tasks. And they cannot be left to chance or addressed solely through fixed compensation structures that reward tenure, nor outcomes in vacuum.

It's not just what presidents achieve, but how they lead

Context: The role of the President is getting more challenging

Private institutions today face...

Increased Accountability Pressures	From boards, donors, and the public demanding transparency and measurable outcomes.
Evolving Expectations of Leadership	Presidents must demonstrate not only institutional results but also ethical, mission-aligned conduct and effective stakeholder engagement.
A Competitive Talent Market	Where effective evaluation builds trust, aligns perceptions, strengthens retention, and enhances institutional credibility.
Leadership Volatility	Shorter presidential tenures heighten the need for structured, developmental feedback to ensure continuity and alignment.
Institutional Complexity and Change	Managing hybrid operations, demographic shifts, and cultural transformation requires adaptive, resilient leadership
Stakeholder Scrutiny	Faculty, students, and accreditors expect visible accountability and meaningful progress against mission.
Governance Demands	Boards must balance oversight, fairness, and support through disciplined, transparent evaluation processes

Context: The Limits of Metrics Alone

- + **Metrics measure outcomes, not impact.** They can show a balanced budget but not the trust or engagement it took to get there.
- + **Data can't detect leadership strain.** A president may hit goals while eroding confidence, culture, or collaboration.
- + **Short-term results can mask long-term risk.** Meeting targets today may create morale or reputational challenges tomorrow.
- + **Metrics can't reflect institutional complexity.** They miss the nuance of trade-offs between financial, academic, and cultural priorities.
- + **Balanced evaluation restores context.** Pairing measurable goals with leadership behaviors gives the board a complete, credible picture of performance.

**It's Time to
"Open the Aperture"**



Leadership Effectiveness Matters Now...More than Ever.

Leadership style and behaviors are inseparable from institutional outcomes



Sustainability: Outcomes won't last if culture erodes.

Financial or enrollment gains achieved through fear, burnout, or broken trust rarely endure. Presidents who neglect institutional culture may deliver short-term wins but leave lasting damage. Evaluating leadership behaviors helps boards identify whether results are being achieved in ways that strengthen or weaken the institution's long-term capacity to perform.



Retention: Faculty and staff engagement is a leadership outcome.

Faculty and staff don't leave institutions—they leave leadership. Turnover, low morale, and disengagement often reflect leadership breakdowns more than compensation challenges. Incorporating engagement and morale indicators into evaluation helps the board see how leadership decisions ripple through the organization and affect institutional stability.



Reputation: Ethical lapses or tone-deaf leadership damage credibility.

In higher education, credibility is currency. A president who mishandles communication, ignores shared governance, or displays poor judgment in sensitive matters can undermine years of progress in days. Evaluation of leadership conduct allows boards to affirm alignment with mission, values, and public expectations—before reputational issues become crises.



Crisis Management: In volatile times, judgment and adaptability matter as much as results.

Presidents are increasingly tested by unpredictable events—political interference, social unrest, cyberattacks, or public health crises. Evaluating how they lead through uncertainty—how they communicate, remain transparent, and make balanced decisions—gives the board insight into leadership resilience. Good crisis leadership preserves both trust and trajectory.

Presidential Evaluation Criteria: Opening the Aperture for President-Level Capabilities



Designing the Evaluation Process

Evaluation is not imposed—it's co-designed—which builds trust and equity

+ Evaluation is a partnership → protects trust

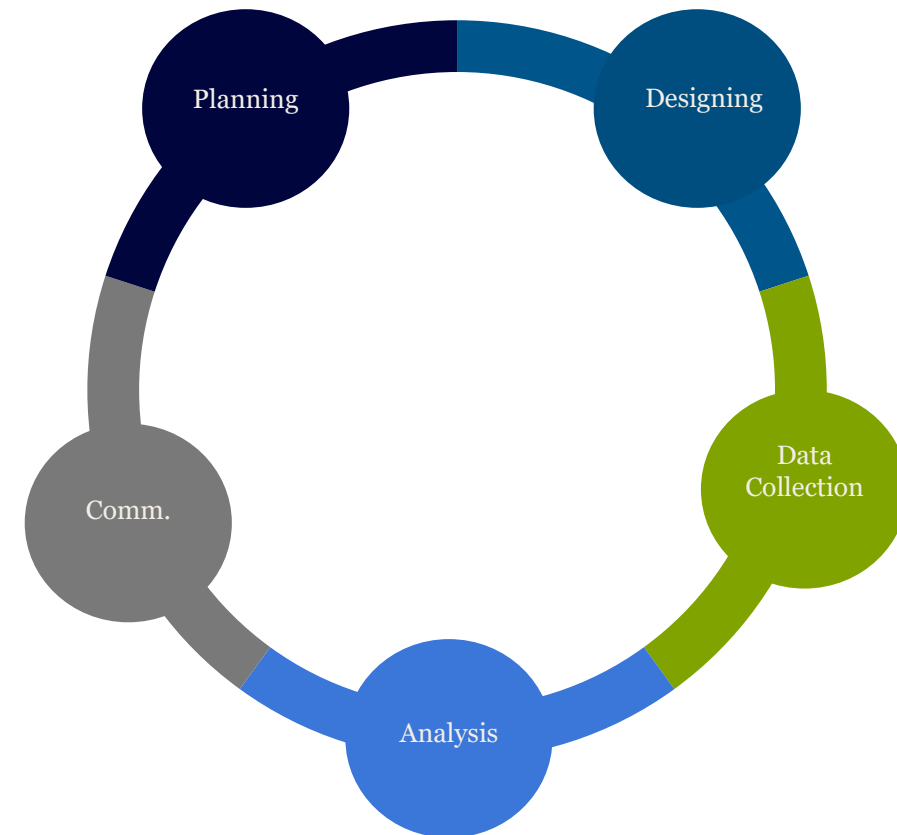
- Clear expectations = less defensiveness, more ownership
- Boards and presidents must share accountability for the process

+ Collaborative Evaluation Design

- Sub-Committee, Consultant, and President align **before data collection**
- Which categories matter most this cycle and in the near-to-medium term?
- How important is year-over-year trend analysis?
- Data-gathering method (survey, interviews, hybrid)
- Governance cadence
- Define categories, metrics, and process

+ Use and timing of Presidential Self-Evaluation

- President provides written self-assessment across 9 categories
- Highlights perceived strengths/weaknesses
- Serves as baseline for comparison with external feedback
- Builds transparency into process



Data Gathering and Methods

“The right method balances and reinforces credibility, efficiency, and trust—not every year requires the same depth”

Options for Data Collection

+ Surveys:

- Efficient but risk superficiality.
- Can be candid and broad, but shallow.

+ Interviews:

- Deeper and richer feedback, lightly filtered more resource-intensive.
- Hybrid: breadth + depth. (i.e. Interview President, Board and Committee Chairs)

Choosing the Right Approach

- + Depends on culture, board bandwidth, trust level.
- + Independent facilitator to maintain candor and credibility.
- + Hybrid approaches should be considered

The goal isn't to collect the most feedback — it's to collect the right feedback for the moment. Most years, a board-led process is sufficient; it ensures accountability and keeps focus tight. But every few years, or at key milestones, a deeper review adds credibility and perspective. The method should flex with purpose. Evaluation should always be multi-dimensional, but it doesn't have to be multi-constituency every year.”

Timing and Cadence

“An overlooked message of evaluation depends as much on when it happens as how it’s done.”



Annual Evaluation:

Establishes accountability, reinforces alignment, and maintains a steady rhythm of dialogue between president and board.



Pre-Contract Renewal Review:

Broader, more developmental evaluation cycle that includes self-assessment, board reflection, and often stakeholder input. Ensures renewal decisions are grounded in evidence, not sentiment.



Pulse Check (as needed):

Informal, light-touch check-ins during periods of transition or challenge — designed to maintain trust and open communication, not to score performance.



Milestone or Event-Driven Review:

Conducted after major initiatives (e.g., capital campaign close, accreditation cycle, strategic plan phase). Provides insight into leadership performance under specific conditions.

- + Evaluation timing is one of the most underrated aspects of governance. When it happens predictably, it normalizes accountability and gives the president confidence that the process is fair. When it happens strategically — before contract renewals, after major milestones, or during moments of change — it provides boards with crucial context and foresight.

Roles in the Process: Applying Good Governance Practices

“Run through the tape...effective evaluation relies on how the results are shared, and communicated – not simply data gathering”

- + **Board Sub-Committee Leads the Process:** typically, the Executive or Compensation Committee designs, manages, and reviews the evaluation — ensuring rigor, confidentiality, and consistency.
- + **Data Are Reviewed, Not Reinterpreted:** the sub-committee analyzes results, identifies themes, and ensures findings are grounded in fact and context, not anecdote or personal opinion.
- + **Presidential Discussion Comes First:** the president reviews and discusses results privately with the sub-committee or board chair. This provides context, clarifies misunderstandings, and keeps the process developmental rather than punitive.
- + **Leadership Alignment Before Full Board Sharing:** the Chair and Vice Chair align with the sub-committee on key messages and next steps before sharing with the full board—reinforcing consistency and mutual respect.
- + **Full Board Review Reinforces Oversight, Not Micromanagement:** the summarized evaluation—focusing on outcomes, leadership, context, and expectations—is shared with the full board to affirm direction, not to debate details

+ The governance review process is where evaluation becomes leadership, not paperwork. The sub-committee’s job is to ensure rigor and fairness — to make sure data are reviewed, not re-litigated. Maintaining alignment and context protects trust and strengthens president-board partnership

Takeaways: Leading Practice Do's and Don'ts

"Good governance evaluation is disciplined, confidential, and developmentally focused — not managerial"



- + **Keep the board's role strategic.** Evaluate outcomes, leadership, and alignment—not daily management decisions.
- + **Preserve confidentiality.** Limit detailed feedback circulation to the sub-committee and leadership. Summarize themes, not quotes.
- + **Provide context.** Interpret results in light of external factors—demographic, financial, or policy shifts—before judging performance.
- + **Engage in dialogue.** Discuss results with the president before presenting to the full board to ensure accuracy and shared understanding.
- + **Document and follow up.** Record findings, next steps, and any developmental goals—then revisit them at the next review.



- + **Micromanage.** Limit turning evaluation into a commentary on operations or cabinet-level issues by focusing on significance.
- + **Share raw data or personal remarks.** That erodes trust and invites unnecessary debate.
- + **Ignore context.** A purely metric-driven approach can distort reality and punish good judgment.
- + **Deliver surprises.** Publicly confronting a president with unreviewed results damages credibility and morale.
- + **Treat evaluation as a one-time event.** Without follow-up, feedback becomes commentary, not improvement.

Why it works...

Boards reward presidents for leading in ways that are sustainable, ethical, and aligned with mission

- + **Drives Accountability and Alignment:** clear goals ensure measurable progress; leadership evaluation ensures those results are achieved in mission-consistent ways. Together, they keep the board and president focused on the same priorities.
- + **Reinforces Trust and Transparency:** evaluating both outcomes and behaviors demonstrates fairness and balance. It builds confidence among trustees, faculty, and stakeholders that performance is judged objectively and holistically.
- + **Encourages Leadership Development:** feedback on leadership style and communication gives presidents actionable insight. It turns evaluation into a learning process—not just a report card.
- + **Strengthens Institutional Resilience:** when boards track both what was accomplished and how it was led, they identify risks earlier—morale, culture, reputation—and support sustainable success.
- + **Improves Retention and Succession Readiness:** presidents who experience fair, developmental evaluation are more likely to stay engaged and committed, while the institution gains a clearer view of leadership capacity for the future.

“
*Comprehensive evaluation —
combining metrics and leadership
assessment — transforms
performance review from a
scorecard into a strategic
governance tool.*
”

Q&A

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Connecting People, Purpose & Performance



Thank You

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