President's Evaluation Update

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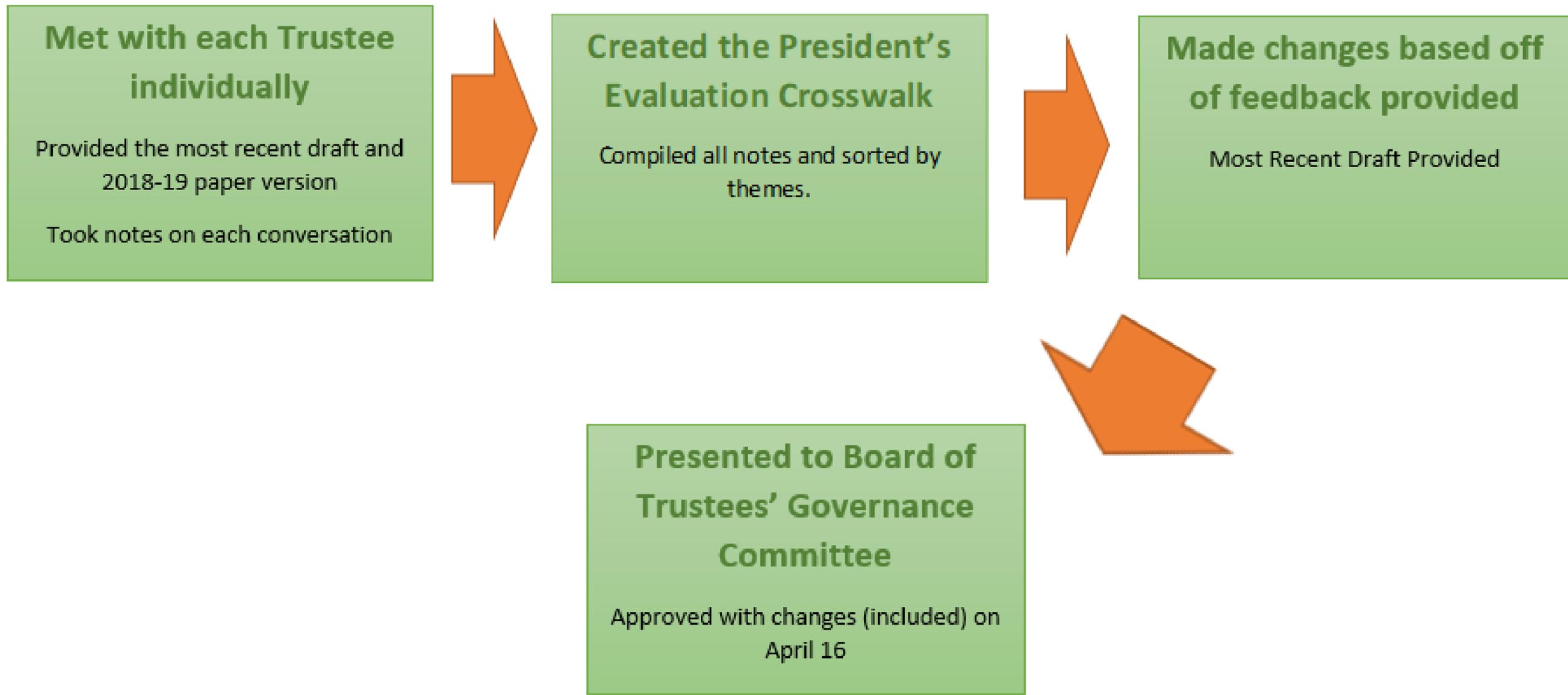**Board of Trustees Meeting, April 28, 2020**

President's Evaluation

Process

Met with each Trustee individually

Provided the most recent draft and 2018-19 paper version

Took notes on each conversation

Created the President's Evaluation Crosswalk

Compiled all notes and sorted by themes.

Made changes based off of feedback provided

Most Recent Draft Provided

Presented to Board of Trustees' Governance Committee

Approved with changes (included) on April 16

Proposed Evaluation

5-point Responses:

Superior, Above Average, Average, Below Average, Poor

7 Factors (37 Questions + Open-ended)
- Annuals Priorities and Goals (9)
- Strategic and Academic Leadership (6)
- Organizational Management (3)
- Financial Management
    - Fiscal Administration (2)
    - Fundraising (3)
- Communication (3)
- Relations
    - Internal and External (5)
    - Board and Governance (2)
- Personal Values (4)
- Open-ended Questions (2)

Following each factor/sub-factor a box is provided for detailed feedback

Revised Survey

http://famu.co1.qualtrics.com/jfe/form/SV_3Iaw5Nz3l17Rd1b

President's Evaluation Crosswalk

President's Evaluation Crosswalk
(Change Recommendations -- From Board of Trustee Individual Conversations)

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Annual Goals	1-9	Show each goal separately with comment box for each	Each goal separate with individual comment box		
	1	Remove 2021 goal of 80 points from this year's 2020 evaluation	Goal Removed		
	3	Break out licensure pass rates by College/School	No Action Taken -- Attempting to limit number of questions		
	5 (a&b)	Collapse 5a into one question	Collapsed 5a into one question (encompasses all sections)	*Development and implementation of training and service excellence programs; initiate preliminary benchmarking; and monitor service excellence (President Robinson to provide a self-assessment response that addresses the comprehensive implementation of the customer service strategy across the full enterprise)*	*Including developing training for development of services, creating service excellence standards, development of a service excellence program, development of a recognition program*
	5a	Combine 2nd and 5th	Collapsed 5a into one question (encompasses all sections)		
		1st and 3rd are redundant			
		Combine 1st and 4th			
		Reword Question (from Governance Draft to Final Draft)	Reworded		
		Add following expectation: (President Robinson to provide a self-assessment response that addresses the comprehensive implementation of the customer service strategy across the full enterprise)	Added		
	5b	Keep as-is (fix typo)	Typo corrected		
	1-9	Incorporate graduate and undergraduate in goals	No Action Taken -- Goals voted on by Board; unable to revise		
	Full Section	Rename the Goals to *Performance-based Funding Metrics* -- Move goals to their respective areas to align thinking			

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Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Leadership		Break back into two sections (Strategic and Educational)	Renamed to *Strategic and Academic Leadership*		
		Do not break into two sections			
		Add crisis management	Question Added	*Appropriately handles crisis and ensures that contingency plans are in place to avert or plan for future crisis*	
		Include progress to removing repeat issues			
		Agility -- ability for President to pivot	Question Added	*Understanding and ability to stand firm in decisions or to make quick changes, as appropriate*	
		Ability to maintain a firm position regarding the university despite controversy			
		First question is unclear -- remove or reword	Question Removed		*Discerns the meaning of trends and determines best how FAMU can thrive in them*
		Add using available data to make timely and informed decisions	Question Revised	*Uses data to make timely, informed decisions that drive a culture of improvement in academic and administrative areas*	*Assures academic quality using evidence to improve performance*
		Timeliness of decision-making			
		Extent to which President is using performance data to drive change and create a culture of improvement			
		Competitive advantage	Question Revised	*Leads stakeholders in implementing strategic initiatives (short-term and long-term) that achieve a competitive advantage*	*Leads stakeholders in strategic initiatives that drive the forces of change*
		Long-range strategic plan			

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Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Organizational Management		Remove question redundant (also in Communication)	Question Removed (in this section -- remains in Communication)		*Is an inspirational communicator who wins hears and minds of audiences through painting a compelling future vision for the university*
		Add question on building a leadership team (put at tope)	Question Added (First Question in Section)	*Builds and oversees a highly-effective leadership team that takes responsibility, sets and achieves goals that advance the University's mission*	
		Succession Planning			
		Include first question in original document: *Management -- analyze, organize, plan, direct, evaluate, renew -- basic institutional processes and resources (finances, technology, human resources, facilities, services, etc.)?*	Covered by two questions: *Builds and oversees a highly-effective leadership team that takes responsibility, sets and achieves goals that advance the University's mission* and *Sets clear priorities and holds people accountable to outcomes, timelines, and checkpoints; follows up to ensure successful completion of objectives*		
		Include second question in original document: *Create a sense of urgency and drive results in key performance areas such as admissions, enrollment, retention, student learning, fundraising, research, service, finances, and facilities?*	Covered in multiple questions throughout the evaluation (*Too long to include all questions*)		
		Clear, timely, difficult decisions	No Action Taken (Located In Leadership -- 2 questions): *Uses data to make timely, informed decisions that drive a culture of improvement in academic and administrative areas* and *Understanding and ability to stand firm in decisions or to make quick changes, as appropriate*		

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Organizational Management (cont.)	Crisis Management		No Action Taken (Located In Leadership) -- *Appropriately handles crisis and ensures that contingency plans are in place to avert or plan for future crisis*		
	Inclusivity of all (faculty, staff, students) Strategies of goals related to faculty, staff, students		No Action Taken -- addressed in Relations		

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Financial Management (Fiscal Administration)		Remove and make Financial Management its own Factor and make Fundraising a Sub-factor	Created Additional Factor		
			Renamed Financial Management subfactor to *Fiscal Administration*		
		Plan for the long-term viability of the university -- making decisions today that impact the long-term goals of the university	Question 1 (already existing covers): *Takes a long-term, data-driven approach to financial management that ensures the long-term viability of the university*		
		Assuring there are checks/balances in place that ensure university remains in compliance of spending	Question 2 (already existing covers): *Drives efficiencies and evidences sound management practices to carefully and effectively control and provide oversight of expenditures (includes: development of a budget model, create operating balances, clear audits, etc.)*		
		Define and lead an effective budget management process. Build a budget model.			
		Clear audit			
		First question on original: *Understand and manage the organization's financial dynamics, metrics and processes (budgeting, costs, revenues, overhead, balances, and investments) and communicate financial realities to stakeholders?*			
		Second question on the original: *Manage resources efficiently and build long-term financial equilibrium (create operating balances, add revenues at a faster rate than expenses, provide for depreciation, and increase the purchasing power of the endowment)?*			

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Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Financial Management (Fundraising)		Top quality team in place	Question Added	*Develops an infrastructure of personnel and resources to support a strategic fundraising framework*	
		Ensure that the fundraising development team has the tools and support to ensure exceptional fundraising			
		Develop an infrastructure and process of personnel and resources to support the development of a strategic fundraising framework			
		Management of fundraising			
		Collapse further	No Action Taken -- Attempted to shorten, but was unable to delete any further questions		
		Second from original -- *Build relationships with major donors*	Question Revised	*Builds strong relationships with donors and actively seeks an increased level of contributions required to support the institution*	*Actively seeks an increased level of contributions required to support the institution*
		Third from original -- *Obtain gifts and grants relative to full potential from individuals, alumni, corporations and foundations*	Covered under by two existing questions: *Builds strong relationships with donors and actively seeks an increased level of contributions required to support the institution* and *Facilitates developing relationships that bring grants to the university from governmental and private-sector entities*		
		Capital Campaign included			
		Clear communication about how/where raised funds are stored/earmarked	Covered under existing question (Located in Fundraising): *Develops an infrastructure of personnel and resources to support a strategic fundraising framework*		

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Financial Management (Fundraising) (cont.)	Clear monitoring of funds		Covered by existing question (Located in Fiscal Administration): *Drives efficiencies and evidences sound management practices to carefully and effectively control and provide oversight of expenditures (includes: development of a budget model, create operating balances, clear audits, etc.)*		
	Quantitative Goal		No Action Taken -- Goals voted on by Board; unable to revise		

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Communication		Second bullet is redundant	Question Removed		*Communicates external trends effectively to elicit participation from others*
		Communication and Relations Similar	No Action Taken -- Revised, deleted, added questions based off of specific feedback		
		Change *Inspirational communicator* to *sincere and earnest*	Change made	*Is a sincere and earnest communicator who wins hearts and minds of audiences through painting a compelling future vision for the university*	
		Effective to communicating plans for the future of the university	Covered in Existing Question		
		Effective in listening to stakeholders (specifically faculty) to make them feel heard.		*Encourages communication from multiple stakeholders that creates an inclusive and collaborative culture, including faculty, staff, students, alumni and external stakeholders*	
		Effective Communication with faculty, staff, students, Board and key stakeholders	Question Added		
		Creates an inclusive culture through communication			
		Include survey to get external feedback	No Action Taken -- Outside scope of this project. Unable to facilitate due to time constraints		

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Relations (Internal & External)		Strong relationship with students	Question Revised	*Builds strong relationships with stakeholders (including faculty, staff, students, alumni and external stakeholders) that demonstrate trust*	*Builds strong relationships that demonstrate trust*
		Include Alumni in key stakeholders			
		Strong and meaningful external relationships with key stakeholders			
		Merge Question 4 & 5	Merged Questions	*Partners with external organizations to build relationships that deliver on revitalization efforts and continue and/or increase research and community engagement opportunities*	*Merged questions: Partners with external organizations to build relationships that deliver on revitalization efforts and Partners with external organizations to build relationships to continue and increase research and community service opportunities*
		Communication and strategies	Question 2 (already existing): *Crafts a shared vision that reflects the views of all key stakeholders (including faculty, staff, students, alumni and external stakeholders) and articulates a clear strategy that guides action*		
Relations (Board and Governance)		Partners and communicates with Board	Question Revised	*Partners and communicates effectively with governing bodies (Board of Trustees, Board of Governors, DSOs, SACSCOC, NCAA, etc.) and elected officials (local, state and national) to identify strategic priorities*	*Partners effectively with the Board of Trustees to identify strategic priorities*
		President and Board are in-sync with addressing BOG issues			
		Reference Board of Governors, governmental agencies, legislators			
		Communication with Board of Trustees and Board of Governors is strong			
		Include relationships with Board of Governors and elected local and state officials			
		Include verbiage of "Internal and External; Board and Governance" in open-ended question (typo)	Corrected		

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Personal Values		Add back and include traits not included elsewhere (honesty, trust and confidence, etc.)	New Section; Questions (4) Added	(1) *Exhibits honest and integrity;* (2) *Inspires trust and confidence;* (3) *Respects others and diverse points of view;* (4) *Is an active and engaged listener to discern where additional communication is required*	

President's Evaluation Crosswalk

Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Overall		5 point rating scale is good	No Action Taken -- Existing Rating Scale		
		Stop, Start, Continue	Final Two Questions (1 from original document; 1 revised)	Remaining: *What have been the President's major accomplishments in the leadership of the institution over the last year?* Revised: *What would enhancements would you suggest to improve the President's effectiveness?*	
		Continue and Enhance; Start			
		Add personal values section	Added Section and 4 Questions	See Personal Values Section	
		Focus on Culture in multiple areas	Added in Strategic and Academic Leadership; Organizational Management; Communication; and Internal and External Relations *(Too long to include all)*		
		Goals to be 1/2 or 1/3 of overall evaluation (Total 27 questions)	Attempted to Keep Survey Succinct (Currently at 37 Questions; 41 "Clicks")		
		Items Board can evaluate rather than internal metrics about which the Board may have no direct knowledge	Attempted to resolve this via discussions -- align with what Board of Trustees values		
		Move toward productivity-based, rather than activity-based	Attempted to resolve this via discussions -- align with what Board of Trustees values		
		Academics to go under Leadership	Academic Questions included in Leadership and section renamed *Strategic and Academic Leadership*		
		Would prefer to have open-ended questions at the very end only rather than after each question/section	No Action Taken -- Majority wanted more questions, not less		

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Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Overall (cont.)		What and How -- Discuss "How" the President went about achieving the goals	To be Addressed in each Section's Comment Box		
		Review not aligned with strategic plan and accountability plan	No Action Taken -- Aligned to values provided by Boart of Trustees		
		Integrate the values of the organization	Attempted to resolve this via discussions -- align with items Board of Trustees value		
		Reflect President's relationship with faculty	Included in Communication; Internal and External Relations		
		Reflect President's relationship with students	Included in Communication; Internal and External Relations		
		Capture Leadership Creativity	No Action Taken -- Included within questions throughout the evaluation		
		Social Intelligence	Included in Communication; Internal and External Relations		
		Professionalism, yet ability to have fun	No Action Taken -- Included within questions throughout the evaluation		
		Identify stakeholders	Identified throughout the document (within specific questions)		
		Include audience			
		Missed opportunities	Covered by existing question: *Understanding and ability to stand firm in decisions or to make quick changes, as appropriate* (Strategic and Academic Leadership)		

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Factor (Sub-factor)	Question(s)	Recommendation by Trustee(s)	Action Taken	Added Question	Deleted Question
Overall (cont.)		Navigation through challenges facing higher education	Covered by existing questions: *Effectively communicates how external forces drive internal change* (Communication); *Understands the educational needs of FAMU's population and advocates for student support* (Strategic and Academic Leadership); *Leads stakeholders in implementing strategic initiatives (short-term and long-term) that achieve a competitive advantage* (Strategic and Academic Leadership)		

Questions?

"At FAMU, Great Things are Happening Every Day!"

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