**LEE COLLEGE PRESIDENT'S EVALUATION**

2020

(January 6, 2020 – January 31, 2021)

**Part I - Leadership and Managerial Attributes**

**Instructions:** Please rate the President on the following criteria by circling the appropriate number following each answer.

**Scale**

**5 = Clearly Outstanding 2 = Below Expectations**

**4 = Exceeds Expectations 1 = Unacceptable**

**3 = Meets Expectations 0 = Not Applicable/Not Observed**

**RELATIONSHIP WITH BOARD OF REGENTS:** Fosters collaboration with the Board to achieve stated goals and objectives.

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| 1. **RELATIONSHIP WITH BOARD OF REGENTS** | **SCORE** | **COMMENTS** |  |
| 1. Keeps Board members informed on all issues, needs and operations of the College in a timely manner.    1. Have multiple communications with the Board chair each week.    2. Send frequent updates to Board members and ensure that emerging issues and needs are quickly addressed and brought to the attention of the Board.    3. For example, the recent ice storm created significant hardship on employees. I worked with the Board to quickly recommend their approval of a one-time bonus to address their needs. | **5 4 3 2 1 0** |  |  |
| 1. Works cooperatively with Board members.    1. In regular meetings, executive session, and committee meetings, I am open to ideas, listen to the different opinions of the members, and I work to ensure that our discussions are grounded is what is best for the College. | **5 4 3 2 1 0** |  |  |
| 1. Keeps lines of communication between Board and President open and clear.    1. I have frequent communications with the Board chair to ensure strong lines of communication between the President and the Board. | **5 4 3 2 1 0** |  |  |
| 1. Interprets and executes Board policies.    1. In all settings, I follow Board policy. For example, recent legislation required the modification of guidelines for student expression on campus. In keeping with this policy, procedures were prepared and are in the approval process. | **5 4 3 2 1 0** |  |  |
| 1. Offers professional advice to the Board on items requiring Board action, with appropriate recommendations based upon study and analysis.    1. I strive to support Board members as they make decisions. I provide risk analysis supported by data to aid in their decision-making.    2. For example, last summer when enrollment was down by 50%, I recommended that the Board adopt a measure to offer free tuition. This proposal was accompanied with fiscal analysis and appropriate recommendations. | **5 4 3 2 1 0** |  |

**LEADERSHIP:** Administers the College with sound decision-making, strategic planning and futuristic direction within approved budget levels and expenditures to meet the mission and purposes of Lee College.

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| 1. **LEADERSHIP** | **SCORE** | **COMMENTS** |  |
| 1. Uses data as the basis for making sound decisions.    1. Data are fundamental to my leadership style and to my team. Both quantitative and qualitive data is used to support sound decision-making.    2. For example, at the last Citizens Bond Advisory Council meeting, I shared data regarding the College’s service area and enrollment patterns to inform our future strategy. | **5 4 3 2 1 0** |  |  |
| 1. Manages the college’s strategic plan effectively.    1. The College’s current strategic plan is being executed as approved by the Board. Managing the plan has been challenging because measurable targets were not established to assess the effectiveness of the plan.    2. A new strategic plan is currently being developed for the Board’s consideration. It includes specific measurable targets with accompanying deadlines. | **5 4 3 2 1 0** |  |  |
| 1. Ensures that the college’s expenses do not exceed available revenues.    1. Working with the College’s Chief Financial Officer, I monitor expenses and revenues to ensure that expenses never exceed available revenues.    2. Through the Board’s diligent fiscal oversight, the College is projected to end this budget year with nearly $28 million in reserves. | **5 4 3 2 1 0** |  |  |

**COMMUNITY RELATIONSHIPS/ADVOCACY:** Leads the College utilizing an accessible management style which contributes to staff morale, national-state-local community support, and appropriate delegation of authority while seeking input resulting in effective direction of the various divisions of the College, i.e. instructional services, administrative services, student services, institutional advancement, and information technology.

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| 1. **COMMUNITY RELATIONSHIPS/ADVOCACY** | **SCORE** | **COMMENTS** |  |
| 1. Represents the College at local, state, and national levels in an effective manner    1. I am a member of the Baytown Rotary. I serve on the Boards of the United Way, Chamber of Commerce and Economic Alliance. I have recently been invited to serve on the Boards of the Baytown Rotary and the Baytown Methodist Hospital. I represent the College at the Texas Association of Community Colleges, the American Association of Community Colleges, and Achieving the Dream. | **5 4 3 2 1 0** |  |  |
| 1. Maintains an accessible leadership style with an ability to negotiate, mediate, and gain consensus among campus constituents.    1. I have biweekly meetings with all three assembly presidents to build consensus and negotiate any issues. I attend and present at monthly Faculty Assembly Meetings. I hold campus forums during convocation weeks and I follow an open-door policy. | **5 4 3 2 1 0** |  |  |
| 1. Maintains the respect and support of the community as an educational leader.    1. I work collaboratively with my colleagues at the ISD level in order to promote a college-going culture. I attend meetings with City of Baytown leaders to advocate the needs of the College. I provide regular reports to community organizations including the Baytown Rotary, Kiwanis, Economic Alliance, and the Baytown Chamber of Commerce.    2. I was recently awarded the Excellence in Education Award by the Greater Houston Women’s Chamber of Commerce. | **5 4 3 2 1 0** |  |  |
| 1. Effectively promotes the College in various forms of public media.    1. I have been featured on multiple platforms including the local newspaper, national publications including the Chronicle of Higher Education and Inside Higher Education, social media, and news television. I represent Lee College and advocate on its behalf. | **5 4 3 2 1 0** |  |  |
| 1. Works effectively with public and private agencies to promote the College.    1. I work collaboratively with public and private agencies to promote Lee College and its needs. This includes ISD partners, public health officials, City leaders, our accreditation bodies, philanthropic organizations and business leaders. For example, we have had several cooperative events providing free COVID testing to the community in partnership with Harris County Public Health. As outlined above, I attend meetings with City of Baytown leaders and provide regular reports to community organizations including the Baytown Rotary, Kiwanis, Economic Alliance, and the Baytown Chamber of Commerce. | **5 4 3 2 1 0** |  |  |

**STAFF AND PERSONNEL:** Provides leadership that will guide the College’s role in creating a skilled workforce for the area’s business, industry and government.

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| **D. STAFF AND PERSONNEL** | **SCORE** | **COMMENTS** |  |
| 1. Recruits and makes quality personnel recommendations to the Board.    1. The Human Resources department ensures a sound search process to identify quality personnel.    2. A review of the performance of recent new hires indicates that process is functioning well. | **5 4 3 2 1 0** |  |  |
| 1. Retains and assigns the best available personnel in terms of competence.    1. As part of the College’s reorganization, and in collaboration with Human Resources, we have recruited and promoted exceptional talent. | **5 4 3 2 1 0** |  |  |
| 1. Recommends and implements salary schedules which attract a competent and diverse workforce.    1. Based upon the results of a salary study that indicated that technical faculty were underpaid compared to peers in the field, I recommended that the Board adopt a salary schedule that made their pay competitive with the market. | **5 4 3 2 1 0** |  |  |
| 1. Contributes to good staff morale and loyalty to the institution.    1. I have worked diligently to create an environment in which all employees feel that their contributions are valued and that their well-being is cared for. Communications to the Board have detailed a new Lee College culture in which employees feel heard and cared for. | **5 4 3 2 1 0** |  |  |
| 1. Treats all employees fairly without favoritism or discrimination.    1. In all communications, I strive to treat all employees as individuals. I view myself as a role model for treating others without favoritism or discrimination.    2. Human Resources is responsible for ensuring that all college employees are treated fairly and without discrimination. There have been no reports of unfair or discriminatory behavior. | **5 4 3 2 1 0** |  |  |
| 1. Delegates both responsibility and authority effectively    1. The College reorganization was designed to ensure a clear chain of command, strong delegation, and accountability.    2. Since the reorganization, employees have commented on clearer roles, rapid and sound decision-making, and stronger accountability. | **5 4 3 2 1 0** |  |  |
| 1. Communicates well with administration, faculty, and classified staff.    1. As outlined above, I meet biweekly with the presidents of the faculty, staff, and administrative assemblies to ensure regular and mutual communication.    2. I send out regular college communications via email, in person at meetings and forums, and through social media.    3. I attend assembly meetings when invited. | **5 4 3 2 1 0** |  |  |
| 1. Keeps appropriate personnel apprised of progress and problems.    1. Through my executive team and cabinet, I ensure that the College is apprised of the institution’s progress and challenges.    2. I formed a special Safety Committee that met twice a week to handle safety issues during the pandemic. I formed an enrollment committee that also met twice a week to address the crisis around enrollment.    3. I formed a graduation committee to create our first ever pandemic graduation ceremony.    4. In each case, the committees that I formed ensured that the appropriate personnel were apprised of progress and problems. | **5 4 3 2 1 0** |  |  |
| 1. Expresses written and oral communications accurately and clearly.    1. The Executive Director of Marketing and Public Affairs, along with my executive team, ensures that all communications (written and oral), are accurate and clear.    2. We have a review process to check for accuracy and to avoid possible misinterpretation. | **5 4 3 2 1 0** |  |  |
| 1. Demonstrates skill in identifying talent and effecting growth of others through coaching, counseling, delegating responsibility, and assessing results.    1. The reorganization was an extensive process that focused on identifying the best talent for accomplishing the College’s goals. One of its main outcomes was the promotion of existing mid-level leaders.    2. The effectiveness of the reorganization demonstrates the outcome of identifying strong talent and the provision of coaching and mentoring to ensure professional growth. | **5 4 3 2 1 0** |  |  |
| 1. Promotes shared governance.    1. Shared governance is a foundational pillar of the College. I have clearly articulated the importance of shared governance to the Provost and to the faculty as a whole. In matters that directly affect curriculum and instruction, the Provost ensures strong voice and opportunities for decision-making including in the College Curriculum Advising Committee. | **5 4 3 2 1 0** |  |  |
| 1. Implements administrative policies and procedures fairly according to Board policies and procedures.    1. Administrative policies are designed to provide guidance for the application of policy and translation into business practices that are efficient and effective. | **5 4 3 2 1 0** |  |  |
| 1. Ensures maintenance of current and accurate job descriptions of employees and implements fair and objective personnel evaluation procedures.    1. Human Resources ensures the maintenance of current and accurate job descriptions and of objective annual performance review processes.    2. Recent updates were made as part of the College reorganization.    3. Due to the pandemic, annual reviews were extended into the next year and are now being resumed. | **5 4 3 2 1 0** |  |  |

**BUSINESS AND FINANCE:** Develops the College by maintaining an entrepreneurial approach to grant development, fundraising, partnerships, and innovative staff and resource development to improve institutional effectiveness and program enhancement. Adapts to and anticipates change that has important implications for the College. Leads change for the College, as conditions require.

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| **E. BUSINESS AND FINANCE** | **SCORE** | **COMMENTS** |  |
| 1. Plans, organizes, executes, and controls fiscal activities by employing optimal use of all resources.    1. The budget, as approved by the Board, is the template for controlling fiscal activities. Internal controls are in place and regular reports demonstrate that resources are being optimally used. | **5 4 3 2 1 0** |  |  |
| 1. Adheres to audit recommendations.    1. The College just completed its latest audit with no recommendations. | **5 4 3 2 1 0** |  |  |
| 1. Makes data driven and sound recommendations for adequate funding.    1. Following an annual process, and guided by the strategic plan, budget managers identify needs. The cabinet reviews needs and ensures sound recommendations for the budget.    2. The CFO compares needs against projected revenues to ensure a balanced budget. Results of the past year show that this process is working as designed. | **5 4 3 2 1 0** |  |  |
| 1. Operates the College within approved budget based upon revenue estimates and expenditures which are consistent with the mission and objectives of the College.    1. Data is used to project future spending and ensure adequate funding. Each budget manager completes a “shadow” budget to ensure strong fiscal management.    2. The acquisition and dissemination of CARES funding is a recent example of evidence-based decision making. | **5 4 3 2 1 0** |  |  |
| 1. Demonstrates ability in fundraising and resource acquisition to improve services to the College.    1. Working with senior cabinet, the College has secured multiple grants at the federal and state level including a Title V grant, Temple Foundation grants, Perkins grants, and Texas Workforce Commission funding as well as much else to support college operations.    2. In collaboration with other CEOs and TACC, I have advocated for level funding and funding for growth in the legislature. The legislature is still in session, but we anticipate full support from our representatives and the state due to the unified voice of the CEOs.    3. The reorganization of the Foundation included the reassignment of Dr. Oriano as the Executive Director of the Foundation Board and the creation of a Director of Major and Planned Gifts. I continue to support the College’s Foundation by sharing college priorities and follow their direction for the development of donors. | **5 4 3 2 1 0** |  |  |
| 1. Invests for safety, liquidity and yield excess fund.    1. Investment strategy is defined in Board policy which I support.    2. By the end of the current fiscal year, the College is projected to have $28 million dollars in reserves. | **5 4 3 2 1 0** |  |
| 1. Keeps Board informed on fiscal state of affairs affecting the College.    1. The Board receives a monthly fiscal update during its regular meetings. The CFO is available to answer all questions. | **5 4 3 2 1 0** |  |
| 1. Envisions where trends are leading and plans appropriately for maximized results so that the College manages change in an effective way.    1. The pandemic has been a catalyst for predicting trends for the instructional mission of the College. The new strategic plan capitalizes on trends to help the college manage change. | **5 4 3 2 1 0** |  |

**PERSONAL QUALITIES:** Possesses effective management and organizational skills. Demonstrates the important attributes of honesty and integrity, and has strong human relations skills. Utilizes a management style that relates to others in a respectful way.

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| **F. PERSONAL QUALITIES** | **SCORE** | **COMMENTS** | |  |
| 1. Maintains high ethical standards.    1. I see myself as a role model and regularly communicate to my direct reports the importance of high ethical standards in all regards. | **5 4 3 2 1 0** |  | |  |
| 1. Earns respect among professional colleagues.    1. Through regular communications I demonstrate my respect for my colleagues and elicit respect in return. | **5 4 3 2 1 0** |  | |  |
| 1. Demonstrates the ability to work well with individuals and groups.    1. I regularly meet with both individuals and groups to lead the College. In all forums, I demonstrate respect and cooperation to achieve mutual goals and develop high performing teams. The many accomplishments of the past year are evidence of this cooperation. | **5 4 3 2 1 0** |  | |  |
| 1. Communicates effectively.    1. The importance of communication cannot be overstated.  For this reason, I constantly communicate and meet with people to ensure uniformity of our priorities and goals as well as proper delegation. | **5 4 3 2 1 0** |  | |  |
| 1. Demonstrates soundness of decisions, solutions, and recommendations, even under pressure; considers alternative approaches.    1. The COVID pandemic created a myriad of decision moments that required prudent and rapid decision-making. The success of the institution throughout this crisis shows that the decisions were sound even under pressure. | **5 4 3 2 1 0** |  | |  |
| 1. Demonstrates systematic and analytical approaches to problem-solving that results in effective resolutions.    1. As mentioned above, the COVID pandemic required innovative problem solving in order to meet the College’s many challenges. We used a systematic and analytic approach to develop the numerous innovations that allowed us to mitigate its worst effects. | **5 4 3 2 1 0** |  | |  |
| 1. Meets deadlines, prioritizes work and completes responsibilities with good productivity, speed, and consistency.    1. As CEO, I understand the importance of conscientiousness. It is imperative to not only meet deadlines, but to anticipate challenges and respond accordingly. I am well prepared for Board meetings and present the highest priority items accurately and consistently and present on the ongoing efforts to achieve college goals. | **5 4 3 2 1 0** |  |
| 1. Maintains professional development by reading, coursework, conference attendance, work on professional committees, and networking with peer group.    1. In my role as CEO, I work with a number of colleagues and other professionals to maintain and enhance my own body of knowledge. I work with our ATD coaches. I work with our Board consultant, Dr. Bill Holda. I work with the CEOs of my peer institutions. I attend conferences and workshops at the local, state, and national level to stay abreast of my field. | **5 4 3 2 1 0** |  |

**PHYSICAL PLANT:** To maintain physical facilities that are conducive to teaching and learning.

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| **G. PHYSICAL PLANT** | **SCORE** | **COMMENTS** |  |
| 1. Develops a system to realistically assess future facility needs.    1. The 2018 Strategic Facilities Plan provides a baseline for assessing future needs. Leadership is currently developing an instructional master plan to augment the Facilities Plan.    2. The College is keenly interested in serving all of its physical service area, especially those areas outside of its taxing district, in order to ensure the integrity of its service area. Options for serving these areas have been discussed and are being pursued. The information from the instructional and facilities master plans will be used accordingly. | **5 4 3 2 1 0** |  |  |
| 1. Maintains and upgrades the physical plant adequately.    1. The Executive Director of Facilities, under the direction of the CFO, maintains and upgrades the physical plant.    2. Large projects are reviewed and prioritized by my Executive team.    3. Critical projects are brought to the Board in a timely fashion. | **5 4 3 2 1 0** |  |  | |
| 1. Keeps the institution abreast of physical plant needs.    1. Understanding the institution’s physical plant needs is a two-way communication from the faculty and staff who see emerging needs at their level up to the Executive team who recognize needs based on larger trends. Both of these pieces of information are used to determine physical plant needs. As outlined above, an instructional master plan is being developed to inform future plant needs.    2. For example, the recent winter storm revealed a critical need for a generator for the Campus Security building. | **5 4 3 2 1 0** |  |  | |
| 1. Maintains capital replacement funds adequately.    1. The CFO maintains capital replacement funds based upon maintenance schedules and communicates this regularly to the Board of Regents. | **5 4 3 2 1 0** |  |  | |
| 1. Ensures projects are completed within budget restrictions.    1. The College’s recent revenue bond provided for a number of physical plant upgrades. All projects are materially complete and were within budget restrictions. | **5 4 3 2 1 0** |  |

**CURRICULA:** Establishes a culture where instruction and learning are critical components of the College. Understand the role of technology in society and education and provides leadership regarding its use to support both the institution and student learning.

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| **H. CURRICULA** | **SCORE** | **COMMENTS** |  |
| 1. Ensures programs follow stated educational objectives and goals of the College.    1. The Provost is responsible for ensuring adherence to the Texas Higher Education Coordinating Board’s and SACSCOC’s rules for educational programming. In collaboration with faculty division chairs and the College Curriculum Advisory Committee, instructional goals are approved.    2. This past year, a comprehensive system of collecting educational outcomes data was implemented and is successfully operating. | **5 4 3 2 1 0** |  |  |
| 1. Fosters and supports excellence in curriculum development and maintenance of academic standards.    1. Faculty and division chairs have primary responsibility for curriculum development and are supported by the administration.    2. As part of the reorganization, the Empirical Educator Center was created and supports curriculum development and academic standards. | **5 4 3 2 1 0** |  |  |
| 1. Reports major curriculum changes or recommended curriculum changes to the Board.    1. All major curriculum changes are reported to the Board and to external agencies as required.    2. A new cybersecurity program is currently in development and will be shared with the Board for approval. | **5 4 3 2 1 0** |  |  |
| 1. Evaluates programs regularly and recommends courses of study, curricula, student activity programs, and other educational and community services to the Board.    1. As part of institutional effectiveness, the College regularly evaluates educational programs to ensure continuous improvement. The Provost is primarily responsible for overseeing program review. | **5 4 3 2 1 0** |  |  |
| 1. Maintains programs useful to needs of students for transfer and the work force.    1. Maintaining a relevant set of programs is critical to the College’s mission. As we prepare to address the economic disruption of the pandemic, it is imperative that we maintain relevant instructional programs, both credit and non-credit.    2. As outlined above, the College is currently developing a new Cybersecurity program.    3. Working with the Vice President of College Advancement, new corporate training programs are currently being developed. | **5 4 3 2 1 0** |  |  |
| 1. Maintains high accreditation standards.    1. The College is currently preparing its Fifth Year Accreditation report, due in September of 2021. The preparation process shows that we continue to maintain high accreditation standards. | **5 4 3 2 1 0** |  |  |

**STUDENT SERVICES:** Responds to the needs of diverse communities and supports the success of the students in these communities in accomplishing their educational goals. Provides leadership that guides the College’s role in providing a skilled workforce, including a general educational foundation, for the area’s business, industry and government.

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| **I. STUDENT SERVICES** | **SCORE** | **COMMENTS** |  |
| 1. Implements College policies regarding the areas of health, welfare, and non-curricular activities for students of all ages.    1. In the midst of the pandemic, the Office of Student Activities continues to provide multiple opportunities for students to engage with the College.    2. The College is actively implementing a new Basic Needs Center and First Year Experience to address the non-academic needs of all students regardless of their backgrounds. | **5 4 3 2 1 0** |  |  |
| 1. Provides for student services which foster cultural growth and leadership potential.    1. The College has numerous programs and services to promote cultural growth and leadership including international education, the Honors Program, the Debate Club, and many more.    2. In addition, the College provides targeted programming for Black History Month, Women’s History Month, National Hispanic Heritage Month, and many others. | **5 4 3 2 1 0** |  |  |
| 1. Provides for a learning environment which encourages development of social and citizenship skill.    1. The programs described above also promote the development of social and global citizenship skills. | **5 4 3 2 1 0** |  |  |
| 1. Implements admission policies which effectively serve administrative and student needs.    1. In accordance with Texas Administrative Code, Lee College develops and implements sound admissions policies that serve its entire community. | **5 4 3 2 1 0** |  |  |
| 1. Ensures an efficient registration process.    1. Even in the pandemic, the College found efficiencies in the registration process including online registration and in-person arena registration events. As a result, the College experienced stable enrollment in both the Fall and Spring and record enrollment during the Summer of 2020. | **5 4 3 2 1 0** |  |
| 1. Ensures that academic records are maintained efficiently and effectively.    1. Academic records are maintained in our PeopleSoft system and are protected with AES 256-bit encryption and a Barracuda backup appliance that meets industry standards and is in accordance with the Federal Educational Records Protection Act. | **5 4 3 2 1 0** |  |  |
| 1. Offers to students and potential students up-to-date and realistic counseling services which deal with scholastic, career and personal needs.    1. Our Advising and Counseling Center as well as our Dual Credit Counselors provide up-to-date and holistic counseling services that address the WHOLE student.    2. The reorganization created a position of the Executive Director of School and College Partnerships to ensure collaborative services to our growing dual credit population. | **5 4 3 2 1 0** |  |  |
| 8. Submits timely reports to the Board and college community validating  student persistence.   1. The College submits regular reports of persistence to its accreditors, the State of Texas, and to the College community. 2. The SACSCOC-mandated student achievement data including disaggregated student persistence is available and regularly maintained on the College’s website at <http://lee.edu/irep/student-achievement>. | **5 4 3 2 1 0** |  |  |

**Clearly Outstanding (4.76-5.00) Exceeds Expectations (4.00-4.75) Meets Expectations (3.00-3.99) Below Expectations (2.00-2.99)**

**Unsatisfactory (Below 2.00)**

03/08/2021

LC/ Pres Evaluation 2018 Pt 1