

Review Summary

Kim Schatzel, PhD, President

July 23, 2024

Pursuant to the RedBook Section 1.1.2, the University President should be evaluated on a regular basis. The process to be undertaken will be set forth by the Governance & Nominating Committee of the Board of Trustees and the Executive Committee of the Board will be responsible for executing the process.

In July of 2024, the General Counsel and Vice President for Governance & Strategic Initiatives, Angela Curry, facilitated the distribution of the prescribed evaluation to the Board of Trustees and the completed questionnaires were returned later that month with a 92.31% completion rate.

The evaluation included a series of leadership and management criteria typically required of a CEO of a large organization and a ranking of 1-5 with the lowest being strongly disagree and the highest being strongly agree along with a section for comments under each criterion. Also, included was a section specifically related to building relationships with various constituency groups and ranking those in a similar manner with comments. In addition to this written evaluation, the Chair of the Board discussed the evaluation with the Executive Committee Members and the Chairs of the Committees of the Board.

At the end of the evaluation, the Board was asked specifically as to whether they would recommend Dr. Schatzel to continue in her role as President and then make comments as to their ranking. They were then asked for any additional comments related to her performance and to include any suggested goals for the upcoming year.

Related to the leadership and management criteria ranking, Dr. Schatzel scored very well with most all criteria being ranked as “Agree” or “Strongly Agree.” The criteria included the following:

1. Acts with integrity
2. Acts decisively
3. Communicates the University’s vision effectively
4. Successfully manages the resources of the university
5. Is open and transparent
6. Is committed to diversity, equity and inclusion
7. Is committed to shared governance
8. Is committed to the Cardinal Principles
9. Has built a competent senior leadership team

10. Has successfully managed the strategic planning process

Her strongest criteria included: acts with integrity, acts decisively and is committed to diversity, equity and inclusion. Her criteria showing some need for focus included: communicates the university's vision effectively and has successfully managed the strategic planning process.

Related to building relationships with constituency groups, her scoring was also strong with the highest being government leaders, community leaders, and business leaders in that order and likewise the areas showing more need for focus being media, faculty, staff and students. Donors, alumni and the trustees were shown as in the mid range.

The comments under both sections reinforced the strong performance of the president since her appointment. Many of the comments pointed out the significant achievements over the past year such as providing stability of leadership, success with the legislative funding allocations, the reorganization of the administrative and leadership team, and her decisive approach to decision-making.

Related to the question as to whether the Board would recommend that she continue in her current role, the scoring was 100% "agree" and "strongly agree". Several of the comments under this section pointed out that the University, under her leadership, is in sound financial shape with healthy enrollment and brand reputation. Several comments challenged her to continue to improve communication to the constituency groups to further build effective working relationships and to continue to strengthen the interdependence of the University and ULH, ULF and ULAA. It was also pointed out that student success should remain a top priority.

The Board was also asked to make suggestions related to her areas of focus and goals for the upcoming year. The Board put forth many strong suggestions, several of which Dr. Schatzel had already included in her draft of suggested goals for the upcoming year. The suggestions made by the Board will be discussed with Dr. Schatzel and incorporated into her approved goals for the upcoming fiscal year.

The details of the evaluation and comments were provided to Dr. Schatzel and were discussed with her by the Board Chair, Diane Medley. In addition, the entire Board met to approve her final evaluation and goals.