November 17, 2023

Getting the President-Board Relationship Right

It is one of any president's most important tasks, write Julie A. Peterson and Laurie Fenlason, who offer 10 best practices.

By Julie A. Peterson and Laurie Fenlason

Vector DSGNR/Istock/Getty Images Plus

A highly engaged board is a vital strategic partner to a college or university president. And while much of the responsibility for effectively engaging trustees falls on the board and its leaders, a significant portion of this work belongs to the president and their senior leadership team.

This fact is evident to most leaders of higher education institutions who have been in their roles for several years. However, with the increased turnover in presidencies and shortening tenures, the gap in presidential expertise in working with a board is a growing risk factor. We only need look at the past few months of headlines to see one institution after another whose president departed abruptly, often in a disagreement with the board over key questions of mission, strategy and policy.

Proactively and strategically cultivating a productive relationship with the board as a whole, and with individual trustees, is one of the most important tasks for any college president. The good news is that we have observed many leaders who are brilliant at this work. Based on our observations over the years, we offer 10 best practices:

#1. Build the right staff support. Faced with a long list of competing priorities, the president obviously cannot do this work alone (although we have seen some leaders try). A truly effective program of board outreach and engagement requires skilled and dedicated staff work. Often that comes in the role of a board secretary, chief of staff or general counsel. If such a dedicated role does not exist, it may be worth finding the resources to create it. Both existing and new staff liaisons can benefit from refresher training and a clear set of expectations about their role in ensuring that trustees have the resources they need to fulfill their governance responsibilities.

#2. Prioritize the board chair. The relationship between any president and the chair of the board is close and deeply personal. Often beginning during the presidential search process, the president and the board chair develop a shared sense of purpose, values and leadership approach. Ideally, they have an agreement to be completely honest with each other, to hold sensitive information in confidence, and to provide unvarnished counsel without risk of giving offense. Such a trusting relationship requires constant care to maintain; it is not unusual for presidents to talk to their board chair twice a week in good times and once or more per day during times of crisis.

#3. Learn about your trustees. Trustees come to the board with varying motivations, talents and expectations. Those personal factors should be sounded out when someone is first nominated to the board and refreshed annually through surveys, interviews and informal conversations. Questions include: What motivated you to join the board? How do you feel you can best contribute? What experiences and relationships can you activate for the benefit of the institution? How would you like us to communicate with you? What topics are you especially interested in learning more about?

#4. Customize trustees' roles and contributions. Based on what is learned about each individual's interests and abilities, institutional and board leadership can together develop a customized engagement plan for each trustee that includes whether they are being considered for a leadership role, in what topics and areas they want to be immersed, what external relationships they can actively steward for the benefit of the college or university, how often they want to meet with the president or other senior leaders, and how and in what ways they want to be kept updated. This is the companion plan to the highly customized philanthropic plan that the development team should make for engaging each trustee as a potential donor.

#5. Educate trustees about the institution. Boards are composed of people from wide-ranging industries, experiences and backgrounds, with different connections to the university. They may have gaps in their knowledge of the institution's mission, vision and culture—and some trustees may not have much experience with higher education nor the institution's position relative to its peers and competitors.

In particular, trustees who come primarily from a business background may need help to understand the hallmarks of academic culture such as shared governance, tenure, academic freedom and a pace of change not linked to quarterly earnings cycles. To build an effective partnership with the board that endures when times are tough, institutional leaders should invest in building the board's fundamental knowledge before issues flare. That begins with a thorough and thoughtful onboarding process and orientation.

Throughout the year, other best practices include inviting senior administrators, faculty or outside speakers into the boardroom to set the context for a relevant issue; providing carefully curated reading materials in advance of meetings; and staging complex topics over multiple committee and board meetings to ensure trustees are prepared for a substantive discussion.

For example, if student mental health is a particular concern, a sequence of board engagement could include an external expert speaker to set the national context; a curated set of reading materials after the meeting; and a presentation by student affairs or counseling staff at the next meeting on university-specific efforts, followed by breakout groups to discuss a small set of strategic questions. Trustees also should be invited regularly to events in the life of the institution that help to deepen their understanding of—and connection to—the campus today.

#6. Help staff liaisons engage productively. Everyone who has ever worked with a college or university board from a staff perch knows how stressful board interactions sometimes can be. Often the board and committee meeting schedules are unrelenting, with last-minute fire drills to develop an agenda, produce materials and prepare for presentations.

A more effective model is to bring everyone who staffs a board committee together early in the year to develop a work plan for the year, with strategic topics and business items slotted in advance. That allows staff liaisons to open a thoughtful conversation with their committee chairs about their goals, the arc of the year ahead, and how they can work together to ensure the committee is a satisfying experience for all.

#7. Ensure effective preparation for meetings. Trustees benefit from relevant background readings in advance of meetings to help them prepare for a substantive discussion. Unfortunately, in light of the "fire drill" experience described above, readings, if shared at all, are often sent too late for busy leaders to spend thoughtful time with them. Meeting materials often include large volumes of committee reports and other housekeeping material.

One best practice is for the president to write a cover memo to the board at least one full week in advance of the meeting to set the context, highlight a small number of readings that deserve extra attention, and pose thought-provoking questions to help trustees reflect in advance. If a lengthier document—such as an externally commissioned review—requires trustee attention, it's best to send it even earlier to give the board more time to engage with it thoughtfully.

#8. Actively seek discussion and feedback. Many boards we have observed over the years have a "culture of politeness," in which individuals tend not to ask questions or make comments for fear of giving offense or being out of their depth. And annual surveys sent to solicit trustee feedback about meetings tend to gather surface responses, if any. Sparking real discussion and substantive feedback takes work.

During meetings, the president and board leaders can model a desire for feedback by leaving plentiful time for discussion and asking provocative questions to kick off the conversation. An inviting question sets up space for disagreement; for example: "I'm wrestling with the tension between Goal X and Goal Y. How will we know we have the balance right?"

Another effective approach is to reach out to individual trustees in advance of a specific topic to have a pre-conversation and encourage them to contribute their ideas and questions during the meeting. As part of their regular outreach, the president, staff liaisons and board leaders also can ask individual trustees for confidential feedback about their experience in a particular meeting and more broadly. Most importantly, the president should develop trusting relationships with a handful of trustees with whom they feel comfortable sharing confidential information and seeking counsel. Building frank and trusting relationships with key trustees also gives the president the latitude to push back on the board, when needed, to preserve institutional mission and values.

#9. Steward trustee giving in a highly personal way. Boards of private institutions, in particular, often play a vital philanthropic role, with trustees donating significantly to support leadership priorities. While stewardship of major donors is always a priority for the fundraising team, when the donor is also a trustee, there is both the need and opportunity for an extra layer of care.

Examples of great trustee stewardship include: announcing a big gift at a board meeting so the donor can be recognized by their peers; inviting presenters to board meetings or dinners to illustrate the impact of one or more trustee gifts; organizing public events and panel discussions that convey the impact of trustee giving to a broader audience; and developing enhanced multimedia storytelling to convey the impact of trustee philanthropy that can be shared with the entire board.

#10. Communicate openly and actively. Although it's important to understand individual and group preferences regarding mode and frequency of communication with trustees, we find in general that college leaders under-communicate with their boards. Outside of official meeting materials, some leaders tend to write to their trustees only when an issue is erupting, which can leave an unfortunate impression over time that the building is always on fire.

An effective program of communication with trustees includes early notice of big announcements and new program launches; "heads up" messages about sensitive matters, accompanied by background, talking points and FAQs where appropriate; and periodic round-ups to share multiple, shorter updates. An advanced trustee communication program also includes personalized notices by phone or in writing to individual

trustees based on their areas of interest. For example, one trustee may be especially interested in athletics and wants to know all the progress on a major construction project, while another may be invested in support for first-generation students and should be sent any items related to increasing access. The president should do some of this outreach, but other senior leaders also may be deployed, depending on the topic.

A natural and generative president-board relationship doesn't happen without investment, but the dividends are enormous. Too often, the early practices of building the president-board relationship tend to falter when other priorities take hold. Committing to a sustainable model of interaction can, with practice—and the support of a well-trained staff—move beyond tasks to become instinctive habits that help to sustain a healthy relationship with the board over time.

Julie A. Peterson is a founding partner of Peterson Rudgers Group. Laurie Fenlason is founder and principal of L. Fenlason Consulting and senior associate at Peterson Rudgers Group. They advise higher education boards, leaders and teams on strategy, strategic communications and effective processes for change.

Written By

Julie A. Peterson

Laurie Fenlason