

Managing Presidential Transitions as Chief of Staff



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learning OUTCOME

After participating...

*...you will be able to improve
your processes and
communications in order to
serve most effectively as a
Chief of Staff before, during
and after the transition to a
new President.*

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AGENDA

1. Know Your Position
2. Change Management
3. Discuss Plan for Outgoing President
4. Learn Incoming President's Plan
5. Forecast the University in One Year
6. Your To-Do List
 - Prepare Orientation Materials
 - Schedule Visits
 - Communicate, Communicate, Communicate
 - Step Back

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#1

Know Your Position

Where do you stand currently?

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Focus on YOU and how you would like to be seen

- Be clear about your role and responsibilities
- Have an updated job description
- Understand change will occur
- Determine your short term and long term goals
- Lead by example
- Pivoting will occur

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IMPRESSIONS

#2

Change Management

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Change Management – Key Principles

Seven Principles

1. Understanding the role of senders and receivers
2. Communicating the message clearly without being redundant
3. Differentiating between natural resistance and ongoing resistance
4. Scaling the amount of management with the magnitude of change
5. Staying flexible with the long term vision
6. Empowering action by receiving feedback
7. Addressing individuals rather than getting hung up on the process.

Organization Change: Theory and Practice 5th Edition
By W. Warner Burke

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Process Change Elements

- Celebrating the incumbent
- May be serving two executives simultaneously
- Preparing yourself personally
- Preparing and managing the Leadership team
- Succession planning – thinking ahead
- State laws, public/private issues
- Consultant or not
- Constituent involvement

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#3

Discuss Plan for Outgoing President

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Who you are is more than where you sit

- What are your expectations? Are you keeping your job? Moving on? Are you nervous/concerned?
- What does the Board expect you to do with the outgoing President? New President?
- What does the outgoing President want/need from you?
- What do you think new President will need from you?

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Case Study #1

- The Board and the Departing President Disagree on his new office



Board



President Emeritus

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CASE STUDY #1

- **How do you work with the President before he or her becomes President Emeritus**
 - What is his or her role as Emeritus
 - VP/Director of Facilities is your new best friend
 - CFO/VP Finance has to be the budget guru
- **Who on the Board can you work with to explore options?**
 - Many have executive offices for comparisons
 - How high the profile and expectations
- **Find the solution/compromise early**

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■ Outgoing Presidents: When & Where

- Does the President have a transition plan approved by the Board?
- If President is leaving for another job what is the plan to work with that university on timing/announcement?
- What is the campus announcement plan?
- Where does the President plan to live?
 - Who owns the President's house? Public/Private
- Is the President going to be on campus?
 - Office space and office staff
- Who is going to support a working President Emeritus/Emerita?

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POLL

What is the best way for YOU to be involved in the outgoing President's transition plan?

- a. Work directly with your Trustees to make sure you know their intentions?
- b. Work directly with the executive leadership team?
- c. Have a conversation with the outgoing President?
- d. All of the above

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#4

Learn Incoming President's Plan

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During the search for a new president

- What is your role in the process?
- What does the Board and/or outgoing President expect from you?
- Who will form the search committee?
- Who provides admin support to the search committee?
- Keep campus informed throughout the process.

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New President, New Tasks

- Understand the environment that the President is coming from.
 - Every state and public/private school are different
- What part of the employment contract do you need to know?
 - There may be parts that you will be responsible for reporting
- Will he/she bring staff?
 - If so, do they need to be appointed/approved by the Board
- Will the spouse be an integral part of the school?
- Will the President's residence be changed?
 - If so, when and by whom?

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CASE STUDY #2

The new President urged by the Board to develop a new Five Year Plan for the school

- Is it going to be a major change effort or a minor tweak?
- Who are the participants in the planning effort?
 - Who chairs the effort?
- How do faculty, staff and students participate?
- How will it be announced, communicated, broadcast, etc ?
 - Before or after the plan is developed?
- After the Presidential announcement, who else are the major message carriers?
- Are there intermediate and long term goals?
- How is feedback on the effort obtained? Who monitors?

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#5


Forecast the University in One Year

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The First Year or What Can the New President Expect?

- What key positions may become vacant?
 - Deans
 - VPs
 - Board
- What will the Board composition be in a year?
- What are the political realities in the year?
 - When does the legislature meet?
 - Who are the key players?
- What major plans are in process over the year?
 - Buildings
 - Campaigns



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#6

Your To-Do List

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Preparing the Transition Plan

What the new President really, really needs to know.

- Convince VPs, Deans and others that there are things the new President needs to know.
 - The good the bad and the ugly. Be as thorough as possible.
- You know things that the President needs to know.
 - This is your first chance to demonstrate how diplomatic you can be.
- Work with the Board chair on key board issues.
 - Recognize conflicts, if any, within the board. Try to present both sides
- Which key community leaders need to be addressed? Alumni?
- Makes sure the President knows agendas before the meetings.
- Ensure general counsel is involved at every stage.

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Scheduling Visits

Managing Low Profile Visits

- Work with the Board chair on visits with Board members
- Work with the Deans on specific locations/times/events
- Which VPs need to be included
- Schedule General Counsel brief
- Spend some time getting answers to key questions

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Communicate, communicate, communicate

- You are going to be one of the few with "insider" knowledge
 - Use it carefully. Be wary of those who seek more and more.
 - Recognize that each group has its own needs
 - Faculty need reassurances about academic roles, practices, and customs
 - Staff need good information from schedules to organizational changes-sometimes just reassurances
 - Students want and need access
 - Plan carefully, use student leaders, encourage maximum attendance

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Step Back

It is not about you – it is about the university

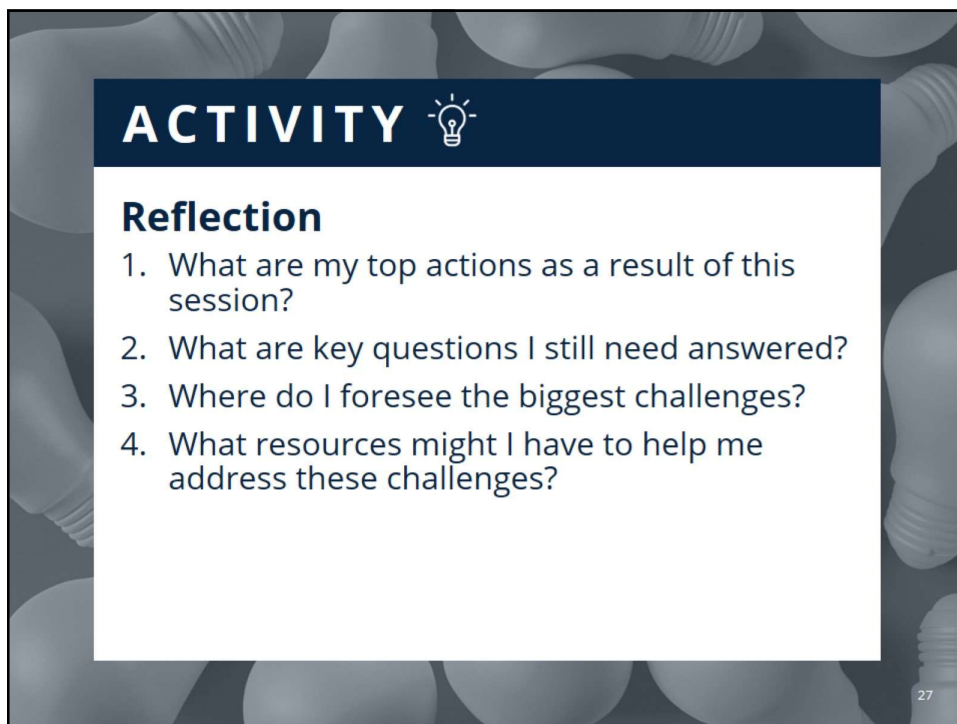
- First and foremost – you can't do it all.
 - Ask for help early and often
- Second, don't get sucked into adversarial discussions
 - Each group has its own concerns, and most don't complement others
- Remember, you work for only one person and until that changes, he/she gets all your loyalty

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VALUABLE RESOURCES

- Presidential Transitions – It's Not Just the Position, It's the Transition (Sanaghan, Goldstein, and Gaval)
- Academic Impressions' Presidential Transition Guide
- Presidential Search (Neff and Leondar)
- Presidential Transitions in Private Colleges (Andringa and Spleto)
- Caesar's Wife – The College President's Spouse: Minister Without Portfolio or the President's Conscience? (David A. Williams)
- Spousework – Partners Supporting Academic Leaders (Teresa Johnston Oden)

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The background of the slide features a pattern of light bulbs in various shades of gray, some glowing and some not, creating a textured, conceptual backdrop for the 'ACTIVITY' section.

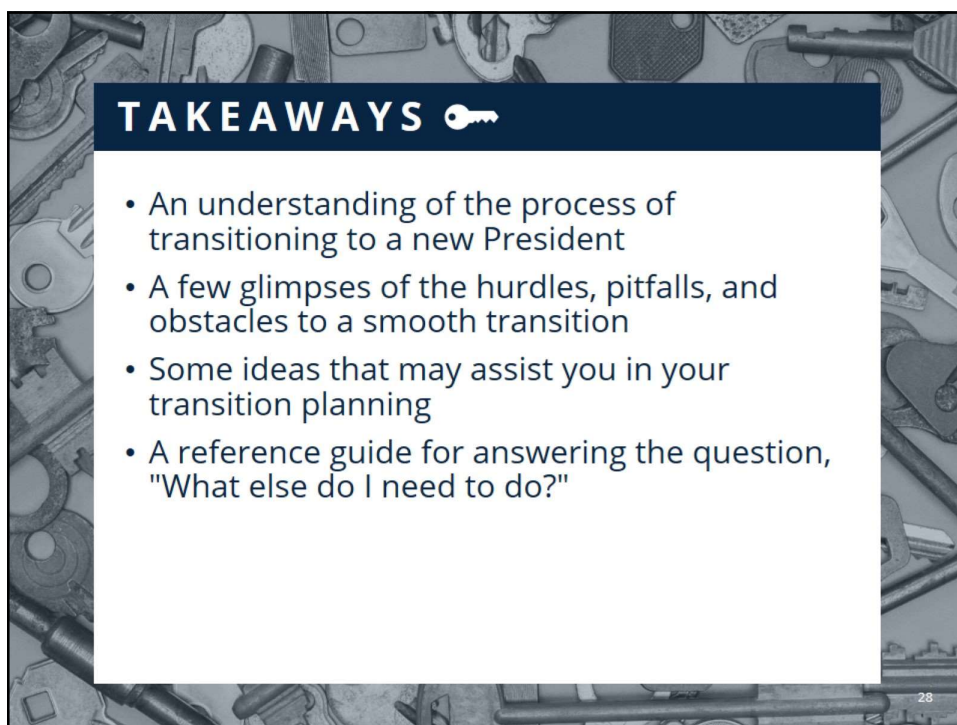
ACTIVITY

Reflection

1. What are my top actions as a result of this session?
2. What are key questions I still need answered?
3. Where do I foresee the biggest challenges?
4. What resources might I have to help me address these challenges?

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The background of the slide features a pattern of various keys in different shapes and sizes, rendered in a monochromatic, textured style, serving as a visual metaphor for 'TAKEAWAYS'.

TAKEAWAYS

- An understanding of the process of transitioning to a new President
- A few glimpses of the hurdles, pitfalls, and obstacles to a smooth transition
- Some ideas that may assist you in your transition planning
- A reference guide for answering the question, "What else do I need to do?"

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Thank you!

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