

Presidential Transition Checklist

Exit Strategy (under good terms)

Goals for the University: Celebrate the legacy, allow for a graceful exit of the President, effectively communicate the goals of the University and conduct a successful search that results in a President that is a good fit.

- ☐ Develop a communications plan (ie. announcement, communication to stakeholders, media).
- ☐ Celebrate the legacy of the outgoing President.
- ☐ Resolve any leadership decisions (for example appointment of an interim President).
- ☐ Request a Strategic Audit report - this will assist the new President in understanding the issues.
- ☐ Future Challenges report – examine the challenges that the institution may face in the future. It is suggested that this report be prepared by the outgoing President and leadership team.
- ☐ Create a Relationship Map – identification of key relationships that are essential to the institution's success. This should be done by the outgoing President.
- ☐ Strike a Search Committee to search for a new President and follow Institutional Search process.
- ☐ Request materials for the Presidential Briefing Binders.
- ☐ _____

Introduction of the new President

Goals for the President: Begin to understand the culture of the University, Listen and Learn and introduce him/her to the constituencies at the institution.

- ☐ Develop a communications plan for the transition period (including announcement, introductory letters to stakeholders, media opportunities – on and off campus, social media, redesign of the office website).
- ☐ Establish a transition committee responsible for organizing the Presidential Transition.
- ☐ Establish a Learning Network for the President (if external to the University).
- ☐ Arrange for a Welcome event for the University community (staff, faculty, students).
- ☐ Arrange for introductory meetings with key University officials and key external community leaders.
- ☐ Need to consider how/if the former President can assist the President-designate.
- ☐ _____

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Early Days

Goals for the President: Personal Introduction to various parts of the University, Listen and Learn, identify critical issues, set expectations, lay the groundwork for the next strategic plan and begin to build relationships

- ☐ Clarify Expectations and appropriate levels of support from the staff in the office (scheduling, communications, correspondence, how to engage the spouse of the President).
- ☐ Orientation Activities as determined by the Transition Committee (meet & greets, informal meals with staff and faculty, meetings with key donors, alumni and external stakeholders).
- ☐ Create opportunities to be seen on campus(es) (walk-about, eating lunch in restaurants on campus).
- ☐ Plan a retreat with the senior leadership team.
- ☐ President should assess progress toward existing strategic plan goals.
- ☐ President should assess fund-raising status and campaign readiness.

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Installation of the President

Goals for the University: Celebrate the new President and the University, engage the University community and set a vision for the future.

- ☐ Develop a communications plan (print, media etc.).
- ☐ Plan a community-wide installation ceremony.
- ☐ Arrange for a student event.
- ☐ Arrange for alumni events.
- ☐ _____

Adapted from Sanaghan, Patrick, Larry Goldstein and Kathleen Gavel. *Presidential Transitions – It's not just the position, It's the transition*. Maryland. Rowman and Littlefield 2008.

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