Transitioning a President  
How to smooth the waters  

~  
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“A carefully planned and executed entry becomes the new president’s first act of leadership” ¹

Preparing Yourself for a New President

- Get Prepared. Do research on the President-designate. The more you know, the better prepared you will be for the transition.

- Reach out to the President-designate and introduce yourself prior to her/his arrival on campus.

- Ensure that all of the office polices, procedures and processes are updated.

- Work on a transition plan for the President-designate (see best practices)

- Make an impression (if the President-designate is unknown to you) ²
  - Clarify mutual expectations early
  - Aim for early wins in important areas for the president-designate
  - Plan for five conversations to build your relationship:
    - i. Seek to understand how he/she sees the situation at the University.
    - ii. Understand the President’s expectations and what you need to accomplish in the short and medium term.
    - iii. Understand how you can best interact with him/her on an ongoing basis (working style conversation).
    - iv. Discuss what resources are critical to move his/her short and medium term priorities forward (resources conversation).
    - v. Discuss how your role will contribute to your professional development (personal development conversation). Are there special projects or assignments that you could get involved in.

*This conversation should occur once your personal relationship has been well established.
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Transition Process

Each University has their own method of facilitating a transition process for their President-designate that aligns with their culture, traditions, structures and established processes. While there is not one particular process that works for all Universities, it is important that the process take into account the following six areas:

1. How the outgoing President is treated is an important signal for the incoming President.
   a. Careful consideration for how the departure of the current President will be handled in terms of events, travelling and decision making must be ensured.
   b. Once the outgoing President has left the office, it is important to consider where the departing President’s new office will be located if he/she is staying at the University.

2. Establish a transition plan for the President-designate

3. Communications Plan
   a. Transition team should develop a communications plan for the transition period and for the early days during the new tenure of the President.

4. Employee Preparation
   a. Develop a short profile of the President-designate to share with staff.
   b. Arrange for a campus welcome event.

5. Orientation Strategies and Activities

6. Briefing Books
   a. Supply the participants with a template so that there is consistency and efficiency to the brief (near-term priorities, recent accomplishments, general statistics, areas in need of enhancement, issues and financials).
   b. Set out the format and content set.
   c. Include sections related to the University’s growth history, financials, organizational structure, relevant legislations, and governance models.
   d. Biographies and photos of key team members.
   e. History and Culture of the institution – important to share highlights and low lights. A learning network can also assist the President in understanding the culture of the institution.
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Transition Best Practices

- Steering Committee to guide transition for the President-designate (examples include: Bucknell University, University of Minnesota and Virginia State University).

- Create a Learning Network\(^2\) for the President-designate to help him/her learn quickly about, and understand, the institutional history, complexities and challenges. The group should represent every stakeholder group on campus, and the individuals should be known for their institutional wisdom, integrity and openness.

- Use Presidential transition to raise institutional awareness and priorities of the university.

- Use a variety of channels to welcome, educate and orient the President-designate.

- Orientation Activities with a variety of audiences (university staff, faculty, union leaders, students, community leaders, government officials, donors, alumni and media).

- Seek input from the university community on orientation activities for the President-designate (example: Bucknell University).

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Reference and Resource List


