Managing a Presidential Transition

FOCUS
George Mason University

November 8, 2011

Larry Goldstein
President, Campus Strategies, LLC
Agenda

- Facilitating the transition of a departing president
- Facilitating the transition of an incoming president
- Questions, comments, and reactions
Departing President’s Transition
Transition Manager

- Chosen by president, possibly with input from board chair (or designee)
- Serves many roles
  - Confidant / Advisor
  - Facilitator / Negotiator / Arbiter
  - Communicator / Manager of Rumor Mill
  - Steward
  - Conscientious
#1 Preventable Problem

- Media attention on president’s residence—especially when deemed to be extravagant!
- As soon as president communicates decision to leave—even before formal announcement
  - Conduct a condition assessment of house
  - Complete all repairs immediately (while no one’s paying attention)
  - Defer cosmetics until new president arrives
Transition Team

- Established by president and transition manager with input from cabinet
- Transition manager chairs the group
- Responsibilities include
  - Development of communication plan
  - Coordinates celebratory events
  - Plans for installation of new president
  - Develops learning network for new president
Culminating Agenda

- President, board chair, and transition manager determine whether the president will tackle any major challenges during the transition period.
- If it’s been a positive tenure, president may be willing to tackle major issue(s) during transition.
- Keep it manageable—care must be taken to ensure it’s feasible to avoid tarnishing legacy.
Develop Communication Plan

1. Preplanning—develop the search strategy, select search committee chair, address interim presidency if applicable, set expectations
2. Formal announcement
3. Open forum
4. Announce the search
5. Name the transition team…
Develop Communication Plan (contd.)

6. Periodic updates on search
7. Periodic updates on transition
8. Announce the new president
9. Develop profiles of the outgoing and incoming presidents (e.g., magazine quality)
10. Installation planning
Board / Staff Connections

- Board chair (or designee) must establish relationship to transition team, especially transition manager
- Individual interviews with senior leaders to assess their plans for the future
- Ongoing contact throughout the process
- Maintains connection to senior leadership team through the transition manager
Strategic Audit

- Written report identifying institutional strengths and weaknesses
- Drills beyond self-studies / traditional briefing books
- Purpose is to inform next president of what he or she will inherit
- Developed from results of anonymous survey of key institutional stakeholders
- Should be shared with search committee
Future Challenges Report

- Supplements strategic audit report
- Informs the board and search committee of what the new president is likely to face and the skills he or she will need
- Informed by a broad range of stakeholders through facilitated listening sessions
- Consider using *Future Timeline* design with intact and diverse stakeholder groups
Relationship Map

- Written document focused on president’s key relationships
- Developed with participation by cabinet members and others (e.g., board chair, executive assistant) with whom president interacts regularly
- Relationships are assigned to key constituents to ensure the ball doesn’t drop between departing and incoming president
Search / Transition Updates

Periodic written—and face-to-face—updates from the transition team to the community

– Identify the team members as well as the search committee members
– Describe the search process
– Announce priorities to be addressed during the transition period
– Report on celebratory events
Outgoing / Incoming Presidents’ Relationship

- Critically sensitive issue
- Outgoing president—whether moving on or staying at institution—can impact successor’s effectiveness
- Incoming president may have strong feelings about what he or she wants / needs to do before officially beginning presidency
- Transition manager must facilitate—may need board chair or search committee chair as well
President’s Future Role

- Staying or leaving
- If leaving, not a significant challenge
- If staying, in what capacity?
  - Faculty
  - Chancellor
  - Fund-raiser
  - Private citizen
- Must agree on do’s / do-not’s
Questions?
Incoming President’s Transition
Develop Relationship With President

- Ideally should start with finalists during search process
- Most important responsibility is to tell the candidates the truth about the institution
- Delicate situation but research shows that search committees do not inform candidates of all the “ghosts”
  - Even when a strategic audit / future challenges report is prepared
President’s Residence

- Create opportunity for walkthrough with president and additional occupants
- Identify cosmetic preferences
- Schedule any redecorating
- Develop communication strategy for any major renovation needed
  - ADA accommodation
  - Upgrades to existing systems
Offsite Retreat

- Very early in president’s tenure, if not before official start date
- One to two days in duration
- Outside facilitation
- Participants should include senior staff and president’s support staff
- Begin building relationships, establish working protocols, agree on initial priorities, etc.
Senior Leadership Team

- Disruptive when turnover hits during transition
- Ideally all members are competent
  - Or, if not, any problems were addressed during transition
- More likely there are some challenges
- New president should delay action during first year
- Avoid bringing in former colleagues
First Year

- Ensure president is on campus and visible, especially during first six months
- Needs to establish presence and become known to campus and the community
  - Advancement and government relations will object to this and want to schedule president for significant travel to state offices and alumni outposts
  - Must be resisted!
Strategic Planning

- Typically, the board will want the president to embark on strategic planning immediately.
- Or, they may want him or her to share their vision.
- The best approach is to defer this until the president has had an opportunity to get to know the institution.
- Ideally, there is an existing plan, and the president should commit to it for the first year.
Learning Network

Establish a Learning Network

- Transition team, with senior leadership, identifies the group that will help educate the president about the institution’s history, complexities, challenges, ghosts, etc.

- Approximately 15 to 20 knowledgeable community members willing to meet individually to get the president up to speed.
President should schedule time with all major established campus / local community groups
– Faculty senate, student government, staff council, etc.
– Alumni board, development board, athletics boosters, etc.
– Local government, community groups, etc.

Focus should be on listening and learning
Educate the President

In addition to cultural education that occurs through learning network and listening tour, new president needs to be educated about operating environment

– Conflicts of interest policies
– Financial / procurement policies
– Budgetary practices
– Open records / open meetings
Early Activities

- First-day informal meet-and-greet
- New student orientation
- Convocation
- As many department visits as possible, especially academic departments
  - May be nothing more than a walkthrough
- Show up at events—as much as practical given institutional size
Managing a Presidential Transition

Questions, Comments, and Reactions

Larry.Goldstein@Campus-Strategies.com
540.942.9146