

Planning: A Key to Presidential Transition

by Marylouise Fennell and Scott D. Miller

In an earlier column we discussed several different aspects of the presidential search process, including assessment, contracts and compensation. The critical "honeymoon" period of a new Presidency—the first few months during the transition from one presidency to another—can make or break a new CEO. In our experience, it can lay a solid foundation for future success or, conversely, it can set the stage for failure.

Here are some helpful suggestions for Boards and new presidents:

- Usually a successful transition can be completed within four to six months. This allows ample time for the Incumbent to wind down and for the new CEO to Prepare and establish action timetables for the presidency.
- A Board Committee (typically the Executive committee) should address any transitional issues relative to the new president's contract prior to his/her arrival. Too often, unresolved contractual issues, such as renovations and occupancy of the presidential house and selection of a car, detract from establishing an early agenda.
- A Transition Committee to assist in defining early operational priorities should be appointed. Ideally, the committee should represent a cross section of the campus community, customarily including the president's executive assistant and other presidential office personnel.
- The Transition Committee should then develop a six to 12-month schedule of introductory events to help the new president develop important relationships, focusing on events already planned such as alumni gatherings, athletic contests, and faculty meetings. It is recommended that community open houses and similar opportunities should be planned for the new CEO to become visible off campus.

- Some events should be "first impression" events. If time permits, it is desirable to maximize the use of the new CEO's travel and appearances by arranging meetings with area media/editorial boards as well as admissions-related events with prospective students and parents.

- An important role of the Transition Committee should also be to help the new president adjust and connect with individuals with longstanding ties to the institution. This could provide the CEO with a strong historical perspective. Attention needs to be given to utilizing the best of the past experiences in planning for the future.

- The Transition Committee should develop a briefing book containing the mission, plans, audits, and accreditation and external consultants reports. Other helpful components might include:

A comprehensive history of the college; Detailed budget and investment documents; Comprehensive external publications and news media clippings from the past three speeches by the former president, and a summary publication of all faculty and staff with pictures to assist the new president in connecting faces with names.

- While the Transition Committee focuses on important relationship building, the Executive Committee should simultaneously be working with the new president on his/her presidential goals to define the vision of the institution. Additionally, this is also an ideal time in which to conduct an Institutional Review.

- A presidential website should be created and accessed from the home page, with an e-mail link to encourage getting acquainted correspondence and communication. This site should also include a detailed profile and a link to an events calendar listing such events as

alumni meetings, football tent parties, Family Weekend, Homecoming, and Commencement.

Even before the newly appointed CEO arrives, two other steps can be helpful.

- Key staff might visit the former campus of the new president to learn operational styles, his/her interests, connections, strengths and areas of need.
- If the former president is available and willing, the new CEO should have an opportunity to spend appropriate time with him/her.

Finally, the Board should appoint an Inauguration Planning Committee. While some presidents prefer to forego a formal inauguration, such an event could be an opportunity to set the tone and vision for an entire presidency.

With sound planning and counsel, the ending of the search should be a beginning, rather than an end. The first few months could then be the first successful chapter in a productive, fruitful and eventful presidency.

Dr. Marylouise Fennell is a past president of Carlow University in Pittsburgh, PA. She currently serves as senior counsel to the Council of Independent Colleges (CIC).

Dr. Scott D. Miller is president of Wesley College in Dover, DE. He has served as a college CEO for nearly 15 years.

Both serve as consultants to college and university presidents and boards.

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