

## Presidential Transitions: Exit, Stage Right

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Several years ago, one of us was asked to meet with a well-respected, successful university president who wanted to talk about his sense of uneasiness about how things were going.

“I’ve been here for 12 years,” he told the consultant, “and I feel very good about my senior team and what we’ve accomplished. But I think we’ve hit a plateau. The focus and excitement just aren’t there anymore.” He asked us to interview his cabinet and find out what they were thinking and feeling. “I don’t believe they’ll tell me the truth to my face,” he said, “because they like me too much.”

He was right. The consultant spent several days on campus, conducting individual interviews with senior leaders. Each member of the team felt proud of their accomplishments and had great affection for the president. They also were afraid to tell him that he had been “psychologically out the door” for more than a year, as one of them put it. Almost half the group suggested, reluctantly, that it might be time for him to leave.

The consultant sat down with his client to communicate these findings. When the conversation came around to his being seen by his colleagues as ready to leave,

the president quickly agreed. He talked about his long-term commitment to the job, but also of a growing sense of restlessness. The job had become too familiar, perhaps, and in some ways even boring. He also discussed his ambivalence and fears about moving on to something else.

Over the next several months, the president and the consultant discussed how difficult it is to let go, the fragility of a legacy, concerns about the future, and the power of the position. At the end of the academic year, the president announced that he would be leaving. In his heart, he knew he needed to apply his passions and time elsewhere. He created and fully participated in a well-planned transition process that was respectful of the institution and enabled the board to choose an effective successor.

History is made when presidents leave institutions. The way they performed in special or difficult circumstances, the endowments attracted, the buildings they saw erected, and their impact as scholars in their fields or in higher education all become the stuff of campus mythology. Negative ripples from a high-level departure can leave an institution shaky and fragile, but an honest and creative transition process will create a solid foundation for a new administration, without the institution losing its momentum.



## Surveying the Psychological Landscape

The real affection presidents have for their institutions can be manifest in having the discipline to ask themselves the tough questions: Do I still have energy for this job? How attached am I to this title and all its perks? Do I lack the enthusiasm needed to respond to important campus issues? And the scarier concerns: What else can I do? Will I be able to function effectively in a different environment?

A first step in answering these questions may come from your significant others—spouse or partner, close friends, and trusted colleagues—for honest and caring feedback about your performance, connection, and interest level. They often know where you are psychologically even before you do. The second step entails personal reflection. In the flurry of campus life, it is difficult to create the time to consider issues such as personal contributions to, and level of continuing interest in, the institution. Sometimes reflection comes naturally, but

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more often it needs to be scheduled. Some presidents conduct personal reviews on their birthdays, the anniversary dates of their appointment, or at the end of the spring semester. Regardless, it ought to be done periodically.

Presidents often struggle with legacy issues that are deeply personal in nature. How will I be remembered? Did I focus on the right things? What did I miss? Is the institution in a better place? The answers to these difficult questions become the substance of a legacy. Defining a legacy within the higher education enterprise is inherently difficult. A president begins afresh with each new cohort of students and each new group of faculty. Whatever has been accomplished in the past becomes the base for future expectations, even before the president has had a chance to complete fund raising for the last project.

Unfortunately, we have found that presidents tend not to engage in discussions around these issues. If these conversations do not take place, the president may stay too long, trying to complete agendas that few people understand. They may have deep regrets about what they were not able to accomplish, or leave behind disappointed colleagues or a demoralized campus.

### Getting on With It

Once the decision to exit is made, the process of selecting and installing a new college or university president is often a long one, usually taking upwards of a year. During this transition, both the president and the board can take steps to ensure that the departure

leaves a positive mark on the institution.

First, it is important that two informational processes be initiated, to let both the institution choose the new president in an informed manner and the new leader make an effective transition onto campus. The president (or the board) needs to commission a *strategic audit report* and a *future challenges report*. Both of these must have wide input across multiple constituencies. (Depending on the open-records laws in the state, it may not be possible for public institutions to maintain complete confidentiality around these reports. The media and general public may be entitled to receive copies. Despite this possibility, we encourage institutions to prepare them when there is a presidential transition.)

The strategic audit report should go beyond summary observations of institutional self-studies or accreditation reviews created for external audiences. This confidential audit must provide a clear and honest assessment of the issues that the new leader is likely to encounter. The report should go to the search committee as well as selected campus leaders. Final candidates for the presidency should also receive a copy so that they can clearly understand the institution's strengths and weaknesses.

The hurdles that the institution faces should receive further examination in a future challenges report. This report can help the board define the unique set of skills and qualities the new president must have to serve the institution well. The report should cover demographics,

emerging issues, and trends. Like the strategic audit report, it should encompass and distill the perspectives of a wide and diverse group of stakeholders, including students, as they are closer to the future than any other stakeholder group but are rarely engaged in institutional discussions.

### Exit Strategy

Beyond his or her role in developing these reports, the president needs to be seen as proactive in designing and nurturing the transition, as opposed to having been subjected to it. This doesn't mean dominating the transition process, but being actively involved in it.

1. *Create a Team.* The president should create a dynamic transition team to guide the process. Responsibilities would include creating a flexible and transparent communication process, providing support for the search committee, and creating a series of celebratory events for the outgoing and incoming presidents.
2. *Make the Announcement.* The president should make an official announcement to the campus community regarding his or her decision to step down. A key purpose of the announcement is to signal the beginning of the transition process and outline what stakeholders can expect to happen while the new president is being recruited. It is important to convey that business will continue, important work still needs to be done, and the search process will be conducted with great care.

3. *Provide Updates.* Even when it is managed well, a presidential transition will create a great deal of stress, confusion, and misinformation. The rumor mill will shift into high gear, and tantalizing stories, often inaccurate and negative, will abound. It is helpful to have weekly transition updates to keep campus stakeholders fully informed. These can be distributed via e-mail or, even better, posted to a web site, where they become accessible to a wider audience. There also should be a series of face-to-face meetings between a designated transition manager, who should be appointed to coordinate communications and orientation activities, and stakeholders throughout the campus. These meetings get key people together for dialogues and are extremely useful for building and maintaining trust. It is critical that stakeholders have the chance to ask questions.
4. *Mark and Celebrate the Endings.* William Bridges (1988) tells us that although it is important to “mark the endings,” we are often reluctant to do so because people don’t like endings. But it is important for the institution to plan a series of events that allow the president and stakeholders to say goodbye to one another. This can be done at formal gatherings, such as convocations, as well as at informal gatherings, lunches, and dinners. It is also important for the president to thank people for their support, acknowledge specific people when appropriate, and talk about hopes and wishes for the institution. These events will help create psychological closure for those who participate and will be an important part of the way the president will be remembered.
5. *Set up an Open Briefing for the New President.* It is important for the new president that he or she hear from the outgoing president the issues that are on the minds of each stakeholder group. Done off site and over a full day’s time, it is the chance to lay out the minefields and unfinished business that will likely arise in the first year. It is not a lecture on how to manage, but a clear map of the most likely issues to arise in the near term.

#### **On That Note...**

We witnessed one president’s slow withdrawal as he backed out of his presidency. He missed meetings, was seen as inattentive at functions, and gradually disappeared from campus. It was painful to watch. Rather than finishing on a high note, he damaged his legacy through inattention and poor planning.

A well-planned, successful presidential transition is characterized as much by what it averts as by what it achieves. Even the most promising successor will be partially, if not fatally, encumbered by the debris of a mismanaged transition. All involved parties, but especially the institution, will suffer the consequences of such neglect. Conversely, if proper, deliberate steps are taken and painstakingly communicated, the successor and the institution can immediately benefit and even flourish during and after the transition. n

#### **Note:**

1. Bridges, W. (1988). *Surviving transitions*. New York: Doubleday.

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