

Effective planning for presidential transition



SPECIAL TO THE RBJ
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It is estimated that one-half of college and university presidents will leave their positions in the next five years. The wave of retirements will result in part because the average age of current presidents has been rising in recent years. Also, because of the demands and stresses of the job, the average length of a presidency has been shrinking and now stands at about six years. The challenges of the pandemic also may contribute to the increasing number of retirements.

The appointment of a new leader is perhaps the most important decision made by the Board of Trustees. Too often, however, institutions begin the process when a departure is announced and focus only on the search for candidates and the selection of the successor. To ensure a smooth transition, Boards should develop a detailed plan

well before any departure that focuses on the entire process, beginning with the announcement of the sitting president's departure and extending to the inauguration of the new president.

While it is the Board's responsibility to select the president, the Association of Governing Boards strongly recommends that development of the plan should include wider participation through the establishment of a transition planning committee. The committee, at minimum, should include trustees, faculty representation, the communications officer, a senior cabinet representative, and legal counsel. In drafting the plan, the transition planning committee should seek input from a wide range of audiences including the faculty, staff, students, alumni and community leaders. The committee should be sensitive to the fact that the anticipated change may create a sense of unease for some members of the campus community.

The plan itself should address the various phases of the transition process, which may vary depending on the reasons for the departure. Some presidents decide to retire or seek a new

position, while others may have been terminated by the Board. In some instances, the transition is the unplanned result of death or illness of the incumbent. Regardless of the reason for the departure, the institution would benefit from having a plan in place that addresses the following key elements:

Communications: From the announcement of the sitting president's departure through the inauguration of the new president, communications will be essential, and a transition plan should assign responsibility for drafting, approving, and deciding on the timing of all communications.

Confidentiality: It is difficult to overstate the importance of confidentiality throughout the search process. Prospective candidates may not apply or may withdraw if they are not confident that their applications will remain confidential from current employers. Working with legal counsel, the transition planning committee should adopt confidentiality rules and forms to be signed by all those involved directly in the search.

Open or closed search: Because of concerns about confidentiality, some institutions opt for a closed search in which only the search committee interviews candidates. In an open search, the final group of candidates is made public and visits with members of the campus community. State institutions often are required to make the finalists' names public. Private schools have a choice, however, and the decision is driven in part by the campus culture.

Search committee: The transition plan should describe the composition of the search committee and the procedure for selecting its members. In addition to trustees, consideration should be given to inclusion of representatives from the faculty, staff, student body, alumni, senior leadership, and larger community.

Search consultant: In most instances, the transition process will benefit from the assistance of a search consultant, and the plan should address the process for selecting the consultant as well as the respective roles of the consultant and search committee members in the process.

Decision-making: At the outset, the campus community should have a clear understanding of the decision-making process. While the Board has final responsibility for appointing the

new president, the plan should detail the role of the search committee in the final decision. The plan should address such matters as whether the search committee will recommend more than one finalist and, in an open search, the committee's process for soliciting input from the campus community.

Interim appointment: An interim president may be needed in the case of a sudden departure of the current president or when the institution has a need to stabilize before beginning the search process. The transition plan should describe the circumstances in which it may need to appoint an interim president and detail the process for selecting that individual.

Role of the departing president: An interesting irony is that the person with the greatest understanding of the position—the current president—is usually not involved directly in the selection of his or her successor. The president might not participate in the identification and selection of candidates but can play a role in parts of the process, such as preparation of both the transition plan itself and the position profile. It also is likely that finalists may desire meeting with the sitting president.

Period after selection: Often overlooked, the period between the selection and the start date

of the new president is a critical period in the transition. The plan should describe the process for publicly announcing the selection and introducing the individual to the community. Consideration also should be given to whether the incoming president will use this period to begin meetings with key constituents such as senior staff, faculty, students, alums, and major donors. The incoming president may be anxious to get started but this is a delicate issue requiring sensitivity to the continued leadership of the current president.

Celebration: The selection of a new leader should be treated as a wonderful opportunity to celebrate the successes of the entire institution. The transition plan should assign responsibilities for development of celebrations that recognize the current president's departure and the inauguration of the incoming president.

The process for selecting a new president can take a year or more, and a thoughtful plan will enable the school to implement an effective transition that positions the incoming president and the institution for future success.

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