

Onboarding A New President

CSC Playbook Series





A change in presidential leadership at a university represents a new era for an institution filled with both new opportunities as well as challenges. Strategic communications leaders on campus are uniquely positioned to help the university's new leader share their vision, build meaningful connections with students, faculty, donors, and other stakeholders, and assuage any unsettledness about the direction of the institution.

Each presidential transition is unique – and can happen slowly or abruptly, on an interim or permanent basis, involve an internal or external candidate, and/or include a president who is a veteran of higher education or entirely new to the academy. This playbook, which is informed by communications leaders who recently went through a presidential transition or are currently in the midst of one, is designed to help institutions think through some critical areas for a successful onboarding regardless of the circumstances.

Establishing A Working Relationship

As soon as a new president has been selected, institutions may consider the following steps:

- Connect with the incoming president's prior support staff such as their executive assistant and/or senior communication staffers to determine what they need to thrive in the role (how they like to stay on schedule for events, what level of staffing they prefer when engaging with stakeholders, whether they are introverted or extroverted).
- Ask the incoming president about their preferred approach to communication with staff (including outside of normal working hours), their preferred briefing style, their preferred meeting formats, areas they're interested in diving deeper into early in their presidency, and what their preferred approach to news media or social media is.
- If they are a first-time president, ask what supports – such as a speech coach, a social media manager for their accounts, or an internal orienting option such as a connection with faculty colleagues in their discipline – they need to adjust and succeed in such a public-facing role.
- Ask what public role, if any, their spouse or partner would like to play as they start their role as president. If they have children who are still minors, discuss whether/how they prefer to shield their children from the public eye.

Briefing the President

Briefing the president is essential to helping them know key stakeholders and issues as they start leading the institution. Some things to consider:

- Have briefing materials from relevant departments on hand to ensure the new president is up to speed on university traditions, slogans, athletic rivalries, and key facts that make the university unique and that they have enough clothes in institutional colors (a pre-arrival welcome gift of a tie/scarf can be useful for the announcement news conference).
- Ensure the president understands the most pressing issues that will require early decisions, actions, or responses as well as things like the state's political culture (in partnership with your institution's government relations team). This may include doing mock Q&As on specific topics of concern for the university.
- Prepare the president for each meeting or engagement with a briefing memo on participants (including things like their background, interests, etc.) and top issues that are likely to arise in conversations with participants.

The Initial Announcement

Key actions to consider for the president's announcement:

- Identify, catalog, and update all areas on the university's website that need to be refreshed for the announcement.
 - Secure high-quality photographs of the incoming president and, if possible, in the university's colors.
 - Determine whether a president has control of social media accounts tied to their name and how active they wish to be on social media.
 - Develop a rollout plan – covering areas such as the announcement to the institution, an earned media plan, a social media plan, photography, video, and lining up third-party validators – to maximize the impact of the announcement.
-

First Days in Office

Key actions to consider for the president's first day in office:

- Build a run of show for events and engagements for their first few weeks in office – what activity, who's involved, what university assets are needed.
 - Identify a way to authentically showcase the new president's biography or personal side in their first few days. This could include things like their personal interests or hobbies or a gesture of kindness such as surprising facilities staff with donuts on their first day in office.
 - Determine which staff are essential for the new president to build a relationship with for a successful onboarding and scheduling time for them.
-

Stakeholder Engagements

Given the extraordinary demand on a president's time and scheduling constraints, some factors to consider in scheduling stakeholder engagements include:

- Create a clear priority list of stakeholders for the president to engage as they take office. University units can provide one-on-one meeting suggestions for 30-, 60-, and 90-day milestones with accompanying one-page briefing materials.
 - » Internal engagements such as: board of regents or trustees, student government, faculty senate leadership, senior university leaders including deans, staff representatives, alumni association leadership, and athletics, other opinion leaders on campus and among alumni.
 - » External engagements: local, state, and federal elected officials, industry partners, donors, news media who regularly cover the institution, presidents of nearby universities.
- Identify someone such as an executive assistant to maintain a comprehensive list of stakeholder engagements so units can petition with their stakeholders for time.
- Schedule based on geographic availability to maximize the amount of time a president is engaging with stakeholders.
- Ensuring a wide enough breadth of engagement so that even if a president can't meet with a particular person who has requested a meeting, they have met with someone in their broad responsibility area such as faculty leaders.



Credit: University of Arizona

Building a Presidential Profile

Sharing a president's biography and personal story is key to building their profile across the campus community and beyond. Consider the following ways to gather this information:

- Review the president's previous accomplishments in academia or the private sector to identify what to include as they build out their profile.
- Ask the president to share their personal academic journey (did they struggle in school, change majors, attend a junior college, have to work as an undergraduate, etc.?).
- Ask the president to share details about themselves such as their favorite food, whether they're a cat or dog person, and other fun personal details. Not all this information needs to be shared publicly, but it can be used to make connections and build relationships across campus and with stakeholders.
- Ask the president something not on their CV that shapes how they view the world or look at things to get a greater understanding of who they are.
- Ask the president their 100-day goals of the presidency.
- Ask the president what about the institution – whether appealing, interesting, or challenging – motivated them to apply.

Honoring the Legacy of the Outgoing President

Honoring the legacy of the outgoing president is a task unique to each institution and president. Some things to consider as you honor the outgoing president:

- Does the outgoing president wish to backload legacy recognition moments in their final year to avoid appearing as a lame duck president when they still have goals they want to accomplish?
- If appropriate, is there a reporter in local media who can do an exit interview highlighting the president's tenure and accomplishments?
- Does building an evergreen webpage for the former president highlighting accomplishments and tenure make sense?
- Remind those engaging with the president that there are many, many "last" meetings or events and that small mementos to remember their time may be better suited than, say, a large picture of the president at an event.
- Ideally, have the incoming and outgoing leaders meet and debrief. This does not always happen organically.

Thank you to Robin Kaler (University of Illinois Urbana-Champaign), Jack Martin (University of Washington), Anthony Rionda (Florida International University), Pam Scott (University of Arizona), and Phil Weiler (Washington State University) for providing the on-campus insights that informed this playbook.