



A Checklist for

With campus CEO transitions on the rise, communications and need to be ready to drive the process

Once you know a transition is coming:

- Draft a communications plan—including timeline, editorial calendars, messaging, and audiences—that incorporates the outgoing CEO's departure, updates on the presidential search process, and preparations for the incoming CEO. Include the board of trustees, search committee, and executive search firm if one is being used.



- Develop key messages about the departing CEO, noting the reason for the departure and the institution's status as it prepares for a transition.

- Determine the approximate departure date of the outgoing CEO and preliminary details about the new CEO search.



- Prepare a statement for campus and internal audiences and another for the media and external audiences.
- Establish a timeline for informing the most sensitive internal audiences, followed by public, press, and external audiences.

- Update the Office of the President/Chancellor webpage(s) with transition information.
- Develop a presidential search webpage(s) that explains the type of search and its criteria, gives updates on the process, and provides search committee information. Ensure that search committee members are prepared to speak to the media as necessary.
- Develop a webpage highlighting the outgoing CEO's accomplishments, including testimonies assessing the impact of his or her leadership.
- Develop the framework for the incoming CEO's webpage(s).

GOODBYE TO U

Check out some of the ways institutions have honored their outgoing CEOs:

CALIFORNIA STATE UNIVERSITY, FRESNO

fresnostate.edu/president/welty

IMPERIAL COLLEGE LONDON

bit.ly/ICLondon_farewellconcert

JACOBS UNIVERSITY, GERMANY

bit.ly/JacobsU_farewell

MUHLENBERG COLLEGE, PENNSYLVANIA

bit.ly/MuhlenbergU_farewelltour

UNIVERSITY OF CALIFORNIA, RIVERSIDE

farewell.ucr.edu

UNIVERSITY OF MIAMI

bit.ly/UMiami_Shalala

PEER REVIEW

Sample these presidential search websites to see how institutions have kept their audiences informed about the search and selection process:

COLGATE UNIVERSITY, NEW YORK

colgate.edu/presidentialtransition

FRANKLIN COLLEGE, INDIANA

franklincollege.edu/presidential-search

SAINT JOSEPH'S UNIVERSITY, PENNSYLVANIA

sites.sju.edu/presidentialsearch

UNIVERSITY OF IOWA

president.uiowa.edu/ui-president-search

UNIVERSITY OF MIAMI

bit.ly/UMiami_PresSearch

UNIVERSITY OF OREGON

trustees.uoregon.edu/presidentialsearch



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Change

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- Work with institutional leadership to gauge the expectations of the board and to gather members' input.

- Determine the outgoing CEO's expectations for his or her departure (will there be a farewell tour?) and any priorities to be supported as part of his or her legacy (will there be an endowed scholarship or other program?).



- Meet with development, alumni relations, and other offices and constituencies (government relations and faculty members, for example) to coordinate plans and determine appropriate messaging for events marking the CEO's departure. Address ways to encourage support of the outgoing CEO's legacy priorities. If appropriate, determine his or her desired level of involvement in welcome and inauguration events for the new leader.

- Update the communications plan as appropriate.
- Meet with key members of your team to ensure strategy and messaging are integrated into appropriate communications channels.

- Draft a plan outlining the first things the incoming president will do following the announcement. (**Great idea:** Create a "First Fives" list detailing what the president should do in his/her first 5 minutes, 5 hours, 5 days, 5 weeks, etc.)

THE NEW LEADER NEWS

"I knew I would get at least a few hours' notice, but I was hoping for a day," says Shirley Melikian Armbruster, Fresno State's associate vice president for university communications. Instead, when California State University's Board of Trustees selected Fresno State's eighth president in May 2013, Armbruster got the heads-up nearly two days before the announcement of Joseph I. Castro as president-designate. While Armbruster describes it as a "luxurious amount of time," there was much to accomplish before the results of the closed search went public, including:

Research: Armbruster searched online for background information on Castro, photos, and especially video clips—anything that would give a sense of his style. She also reached out to Castro's chief communicator at the University of California, San Francisco, where he served as vice chancellor of student academic affairs, to learn how he works and to discuss suggestions for the announcement.

Relationship-building: Within hours, she was on the phone with Castro gathering information—including his communication preferences and availability for media interviews—determining his comfort level with the press, offering communications assistance, and building rapport. "My goal was to establish a relationship of trust and accessibility," Armbruster says.

Preparation: She followed up with talking points for the post-announcement press teleconference, a list of possible media questions, interview requests, a draft of a campus email message, and university pride points.

Follow-through: Early in the search process, she and her staff crafted a plan, including a spreadsheet of priorities with people assigned to each task. They created basic web templates and drafted messages for various communications channels so that once the announcement was made they could plug in the new CEO's biography and official photo and get his input on language. "For months I had been saying I don't want anyone finishing things up on the day of the announcement. I wanted everything ready so that when I said 'Go' everything went live at the same time," she says.

Scheduling: Armbruster set up a photo and video shoot with the president-designate and his wife during their first campus visit. "The material was invaluable," she says. "We used it for months in all of our promotions." She also scheduled interviews with reporters.

Castro also visited retiring President John Welty a few times before assuming office in August 2013. "They let us take a couple of photos of them working," Armbruster says. "You want to project stability during transition. Yes, there will be change, but it's important to communicate that the institution is in good hands."—Theresa Walker

AN APP FOR THE CEO

As the California State University system searched for a new chancellor in 2012, the communications department decided to modernize how it delivers comprehensive briefing materials to the CEO of the largest public university system in the U.S. “The typical experience in higher ed is that people get multiple five-inch binders filled with reams of paper,” says Marge Grey, assistant vice chancellor of communications for the CSU system. “No one consumes information like that anymore. Everybody has some kind of device now, especially CEOs.” The solution: an executive orientation iPad app.

What’s inside: A welcome message, university system overview, strategic plan, key initiatives, funding sources, organizational structure, information on the CSU Foundation, and brief profiles of the system’s 23 campuses and presidents.

Advantages: Portability; accessibility; user-friendly multimedia presentation designed to prevent information overload; ability to update and supplement summaries with links.

Challenges: Gathering information from across the system and paring it down. “I had to do some negotiating on what was included,” Grey says.

Lessons learned: Talented programmers are a necessity. CSU hired outside contractors to build the mobile app but made knowledge-transfer a provision of the project. Now, staff members maintain it.

How it’s used today: The current app is leaner (and device-agnostic). Information that is irrelevant or difficult to maintain was eliminated. The focus is on high-level issues and organizational structure. CSU Long Beach modified the app last year for its new president.

Looking forward: Customized versions are being developed for various internal audiences, starting with trustees and senior university leaders, as part of a comprehensive employee onboarding process.

Vital stats: In addition to outside developers, a five-member internal team worked on the project, which took approximately five months. The budget, not including staff time, was \$15,000.

See for yourself: Download the app at calstate.edu/_ipad. View an interactive PDF-version (circa fall 2012) at bit.ly/CSU_CEOpdf.—TW

When a new CEO is about to be named:



- Determine when and how the public announcement will be made, leaving room for adjustments based on the new CEO’s preferences.

- Meet or speak with the incoming CEO as soon as possible to obtain additional biographical information, his or her thoughts on being appointed, opinions on issues, an initial idea of his or her vision and priorities for the institution, and preferences for announcing and introducing him or her. (If applicable, obtain biographical information on family members.)



- If the CEO is coming from another university, coordinate announcement details and logistics with the communications staff of that institution.
- With the new CEO’s approval, develop a shortened version of his or her bio to use as an official verbal introduction at all university events.

- Gauge the incoming CEO’s level of comfort and skill with the media. If applicable, do the same for the spouse. Arrange for media training/refresher, if necessary.

- Draft a statement to media.
- Organize a live press event and/or virtual press events.
- Draft a list of questions the new CEO will likely receive from media and prepare corresponding talking points.



- Brief the new CEO on hot-button issues receiving attention from the media and the institution’s various audiences.

- Develop a social media plan for the transition.
- Determine the CEO’s comfort level with social media. Consider having the new CEO interact with audiences via social media.



- Determine if the new CEO supports creating a blog to serve as a personal introduction to key audiences.
- Establish a “listening tour” to ensure the new CEO meets with all audiences and constituencies, including advancement offices.



- Make final preparations to launch the webpage(s) announcing the new CEO, his or her priorities, etc.

TAKE ME TO YOUR NEW LEADER

See how a few institutions have heralded their incoming president:

CORNELL UNIVERSITY, NEW YORK
cornell.edu/president-elect

UNIVERSITY OF OREGON
uoregon.edu/president

UNIVERSITY OF RICHMOND, VIRGINIA
presidenelect.richmond.edu

- Send a care package containing campus spirit items (necktie or scarf in school colors, branded tie clip or lapel pin, polo shirt, etc.) so that the CEO will be appropriately outfitted for his or her first campus visit as the new leader.



- Schedule time with the CEO’s spouse, if appropriate, to discuss his or her role, expectations, preferences, and needs at official events.

- Schedule a photo/video shoot with the new CEO (and family, if applicable).

- Review with the CEO the institution’s strategic plan and how communications and marketing fits into it.

MORE TRANSITION RESOURCES

The CASE InfoCenter compiles presidential transition and inauguration planning materials, including documents, communications, websites, and events. Find the sample collection at bit.ly/PresTransitions_sample. The InfoCenter’s Good Question archive on the topic is available at bit.ly/PresTransitions_CASEGO. Have materials worth sharing? Email them to infocenter@case.org. Please include “presidential transitions” in the subject line.

- Review the communications and marketing division’s strategic plan, providing an overview of key organizational issues, outlining strengths, opportunities, challenges, and major areas requiring attention or action.

- Outline the top issues garnering attention from the media and the institution’s various audiences and review the institution’s position on these matters.




- Provide the CEO with language appropriate to the culture and heritage of the campus that lays out the institution’s values and the broad aspirations he or she envisioned when accepting the appointment.

- Identify where the new CEO (and spouse, if applicable) should speak and be visible in the community and consider other media opportunities.
- Introduce the CEO to the institution’s scheduling and briefing process and ensure that any events during the first year are scheduled with much advance notice. Ensure that the CEO’s schedule regularly contains time to make calls to the media and institutional stakeholders.
- Initiate (or renew) the relationship between the CEO’s chief of staff and the communications and marketing office. Establish operating principles for collaboration, defining expectations, and supporting/staffing the CEO.

- Draft an inauguration or investiture plan, including potential dates, audiences, and options for content and format.
- Meet with development, alumni relations, and other offices/constituencies (government relations, faculty, etc.) to coordinate plans and determine appropriate messaging for events marking the CEO’s inauguration.



CASE recognizes that each presidential transition is unique and will present many variables that affect planning. This resource is intended as a guide for expected or planned CEO transitions that occur under optimal conditions, such as those resulting from a retirement or appointment to another institution. 

What would you add to the list?

Email your advice and suggestions to currents@case.org or tweet us at [@CASEAdvance](https://twitter.com/CASEAdvance).