



# Presidential Transition Checklist

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Considerations for leadership teams when  
preparing for a new president

# Preparing for a New President

## Tasks and Guidance for a Successful Leadership Transition

Use the below checklist to help keep your team on track when preparing for a presidential transition. Assign a due date and an owner to project manage each task. There are blank rows at the bottom of the checklist to insert additional tasks as needed.

### To-Do List

Task	Considerations	Owner	Due Date
<b>Schedule Presidential Listening Tour</b>	Who does the president need to meet with to get the lay of the land? Consider scheduling time with cabinet members, board members, students, campus leaders, community representatives, and donors.		
<b>Prepare Briefings on Important Topics</b>	Which topics are most important to help bring the new president up to speed? Who should own preparing materials and briefing the president on each topic? <i>(see page 3 for topic suggestions and a tool to assist with tracking materials preparation)</i>		
<b>Describe and Introduce Key Stakeholders</b>	Who are the key players on campus, the board, in the community, in our alumni and donor base? Who does the new president need to meet personally in their first 100 days? <i>(see the Presidential Orientation PowerPoint template to help compile information on key individuals)</i>		
<b>Build Networking Recommendation List</b>	Who does the outgoing president call for advice? What external relationships will help the new president succeed? Can someone make an introduction?		

### Advice for Presidential Transitions



Continue pursuing ongoing strategic priorities while the presidential position is vacant. A ready-to-go strategic enrollment plan can help a new president get the lay of the land and hit the ground running. Don't lose momentum and miss an opportunity to make positive progress.



Prepare detailed notes and advice on all aspects of the institution. The incoming president will not be an expert on all things higher ed. They will depend heavily on their teams, especially for subjects with which they are unfamiliar.



Assign division leaders to prepare a SWOT analysis of their unit. Present this to the new president along with recommendations from the leadership team on which priorities need the president's immediate focus. *(see the Presidential Orientation PowerPoint Template which includes slides for SWOT analysis.)*



Identify the differences between the incoming president's prior institution and your institution (e.g., does the president come from a larger/smaller institution? An institution with or without an athletics presence?) Focus on those areas in the onboarding conversations and materials preparation.

# Presidential Transition Checklist

## Topics for Briefing Incoming Institutional Leadership

Use this checklist to help your institution prepare for a leadership transition. Assign an owner to prepare information on each topic for the new president and plan time for an in-person briefing where appropriate. Use the rightmost column to assign a due date. There are blank rows at the bottom of the checklist to insert any additions that make sense for your institution. See the Presidential Orientation PowerPoint template to guide materials preparation.

Topic	Considerations	Owner	Due Date
<b>Advancement</b>	Who are the top donors to be aware of? What are our philanthropic priorities? What is the status of our campaign?		
<b>Board relations</b>	Who manages day-to-day board relations on campus? What are tips for working with the board? What are the board's priorities?		
<b>Crisis management</b>	Are there any ongoing crises? Who does the current leadership team call in a crisis? What considerations are most important given our institutional landscape?		
<b>Diversity, equity, inclusion, and justice</b>	What is our institutional history surrounding DEI? What are our pain points? Goals? Who is leading these efforts on campus?		
<b>Enrollment</b>	What is our enrollment strategy? How do we anticipate being impacted by demographic shifts? Where do our students come from? What does our international student landscape look like?		
<b>Finance and Administration</b>	How sustainable is our business model? Where should investments shift? Where are inefficiencies? How much can be saved by consolidating distributed support teams (HR, Finance, IT)? By being more efficient with administrative and academic space? By improving our purchasing oversight and outlays?		
<b>Higher education landscape</b>	<i>(If new president lacks significant higher ed experience)</i> What does the new president need to know about the state of higher education? What higher ed 101 lessons should be shared?		
<b>Impact of COVID-19</b>	How was our campus impacted by COVID-19? What medium to long-term changes have we made as a result?		
<b>Institutional history</b>	What is the story of our institution? How does that impact how we operate today? What is our niche? What is key for someone with no prior institutional knowledge to know?		
<b>Partnerships</b>	What employer partners are we working with? Are we partnered with any K-12 or community organizations? Are there any public-private partnerships we are pursuing? Who manages these partnerships? What are the goals? What is the president's role?		
<b>Policy</b>	What state and federal policies impact our institution and students most? What institutional policies should be called out? What are our accreditation requirements and timeline?		
<b>Professional, adult, and online education</b>	Have we taken full advantage of this market? Are there any programs we want to start? Any we need to sunset? What does our strategy look like in the coming years?		
<b>Strategy</b>	What is our institutional roadmap for the next year? 5-10 years? How agile are we when strategy needs to change? Do we have a strategic plan with actionable steps and measurable goals? Does it need to be updated given our current reality?		
<b>Student Experience</b>	What does the student journey look like from enrollment through alumni? What are we proud of? Where are we trying to improve? What is our strategy to do so?		



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