

**Presidential Transition Guide
Developing Draft for Discussion
June 1, 2018**

Purpose of this document

1. Frame a series of conversations about what success in the presidential transition looks like
2. Invite Tim Cook, Board, current executive team, and transition team to consider what mix of activities, groups, and structures will best support a successful transition
3. Construct a timeline of key activities in the transition that allows people responsible for different parts of the transition to integrate their efforts
4. Provide a framework for Tim Cook, the Board, the transition team, and executive leaders to make clear agreements with each other and identify who owns what promises

Who this document is for

1. Tim Cook
2. Joanne Truesdell
3. Board chair (or Board of Ed)
4. Executive team
5. Executive assistants: Denice Bailey, Sara Sellerds, Greer Gaston
6. Amanda Coffey, transition liaison
7. Lori Hall, PIO
8. Transition team, once created
9. Leadership Cabinet:
 - a. Joanne Truesdell (President)
 - b. David Plotkin (VP InSS) and Alissa Mahar (VP C/S and CFO)
 - c. Paul Moredock (AVP Foundation & College Relations & Marketing)
 - d. Position open (Director College Relations & Marketing)
 - e. Dion Baird (Dean ITS, CTO), Bob Cochran (Dean Campus Services), Lisa Davidson (CBI ED), Sue Goff (Dean A&S), Cynthia Risan (Dean TAPS), Jeff Shaffer (Dean Business Services), Tara Sprehe (Dean AFAC), Bill Waters (Dean EIP), Patricia Anderson-Wieck (Dean HR)
 - f. Jennifer Anderson (Assoc Dean, AFaC), Darlene Geiger (Assoc Dean AFAC), Jarett Gilbert (Assoc Dean TAPS, Director of Health Sciences, Donna Larson (Assoc Dean TAPS), Lisa Reynolds (Assoc Dean A&S),
 - g. Lisa Anh Wang (Director, Institutional Research), Phil Zerzan (Director Campus Safety)
 - h. Amanda Coffey (Transition Liaison)
10. Add additional users . . .

How this Document is Organized

1. Chronologically in 3 chunks of time
 - Between now and July 2
 - July 2 through In-service
 - Fall Term
2. With Common Sections
 - What Success Looks Like
 - Schedule of Activities
 - Additional Activities to be Developed
 - Materials
3. List of Additional Information
 - Possible groups
 - Materials
4. Internal Events and Activities listed by academic term

Between Now and July 2

➤ What success looks like:

Tim Cook, incoming president

- Shapes the design of the transition to build on his strengths and match his style of learning
- Demonstrates continuity and mutual respect with the current President as a person—visually and symbolically
- Reflects on his own personal leadership style, strengths, and improvement areas and assess what this new situation calls for, a.k.a. “What got you here won’t get you there.”
- Experiences a sampling of campus life / *realistic before July 2*
- Reviews key written documents at a pace that works for him
- Learns of the core promises he is inheriting in the job
- Observes the everyday flow of work for key programs, e.g. via targeted email distribution lists
- Creates a separate private record of his concerns, critiques and ideas for improvement
- Creates a network of people to support him on a personal and emotional level
- Relaxes and rejuvenate before starting his new position

Joanne Truesdell, outgoing president

- Publicly demonstrates confidence in the new President’s ability to both sustain what is working well (continuity) and bring his own unique passions and strengths to the work (change)
- Partners with the new President to structure a series of one-on-one conversations that suit the new President’s learning style and pace and help him prepare to lead

- Explicitly delegates a set of decisions and promises to other executive leaders who can hold these while the new President is getting started
- Invites new president to witness and in some cases advise decisions
- Receives a series of positive sendoffs
- Prepares to shift from visible public leadership to behind-the-scenes advising
- Relaxes and rejuvenates

Board members or Board Chair

- Agrees on what success looks like for the new President at specific points of time / *probably after July 2 during Board retreat*
- Make agreements with the new President about how he would like them to talk about him when speaking with members of the community
- Thanks community leaders for proposing meetings with the new President and commits to forwarding these requests to the transition team

Leadership Cabinet members, including VPs

- Calmly and collaboratively focus on how to support a positive leadership transition for the entire College
- Have regular candid conversations with each other about how to sustain mutual trust and avoid the “enemies of trust in presidential transitions”
- Prepare candid and grounded strategic assessments of their divisions/groups for Tim. When the new President asks questions to inform The First 90 Days, people are prepared to respond, e.g. organizational strengths and weaknesses, quality of teams and relationships, assessment of people’s skills, key successes, upcoming initiatives, core promises, results, key existing structures/meetings and their purpose
- Pay attention to retention, especially people at risk of leaving
- Prepare to have conversations for relationship with the new President after July 1
- Individually and collectively mark the ending within themselves so they stay centered during the neutral zone and are open to the new beginning (reference to William Bridges’s three stages of transition)
- Make commitments beyond July and create powerful offers they can present to the new President--rather than waiting for direction

Vice Presidents

- Hold conversations for relationship with the new President

College Community

➤ **Schedule of activities**

Edit this

- Add key dates from communications plan
- For each event, add desired results, min specs, and who owns promise
- Add new events as people commit to them and as we flesh out other sections of this plan

April 26 – May 1	David and Tim at AACC (Tim)
April 27	Board of Ed Retreat (Joanne)
May 2	Community Budget Mtg. (Joanne and Tim)
May 8	Leadership Cabinet Meeting
May 8	Joanne and Tim meet with Amiel and Julie, afternoon
May 9	Board Meeting (Joanne)
May 10-11	Guided Pathways Cohort 1 in Salem (Tim)
May 11	Joanne’s Farewell Party
May 29	Tim meets with Amiel and Julie @ 3-4:30, Harmony East
May 31	In-service meeting in Oregon City, 12-1pm (Tim)
June 1	DeJardin Groundbreaking (Joanne)
June 7	ELC Discovery Day
June 12	Leadership Cabinet – Amanda has 30 minutes for success activity
June 12 12:30-1:30	Farewell Fireside Chat - Joanne
June 14 eve	Graduation
June 15 eve	Graduation (Joanne and Tim)
June 25	DEI Conference at Oregon Gardens (Tim will be out of town. Amanda is attending and will find out who else)
June 27	Board meeting / invite Tim for extended dinner 5-7 / this request belongs to Joanne and Denice / Amanda in Silverton at Leadership Academy conference but can drive back if requested.

➤ **Additional Activities To Be Developed**

This section provides a space to list possible transition activities, groups, and structures. It allows us to explore possibilities before making commitments.

Criteria transition team will use for deciding which to offer and how to schedule

- Contributes to transition success (as defined in this document)
- Makes good use of Tim’s trips to campus
- Honors people’s status
- Thoughtfully sequenced
- Builds on Tim’s strengths and matches his learning style

Possible Activity	Action / Request
Farewell Fireside chat by Joanne.	June 12, 12:30-1:30 in CC-145

Meeting: Tim, Joanne and Denice to discuss calendar, emails, folders, and other virtual office infrastructure	
Create Collaborative Learning Network – Amanda committed to drafting a document including the charge, membership, and meeting schedule.	

➤ **Materials**

Item	Intended Audience	Distribution process or policy	Who owns what promise
Presidential Transition Guide by Gaval and Sanaghan			
Photo org chart			
Briefing Packet and Fact Book			
Tips for relationship conversations			
Video of Joanne’s talk to Leadership Cabinet			

Between July 2 and In-service (September 24-28)

➤ **What success looks like:**

Tim Cook, incoming president

- Evokes a positive mood that reflects the kind of Presidency he will have
- Shows that he honors and is curious about the College’s people, traditions, and values—and avoids offending people.
- Meets commitments on Relationship Map

Joanne Truesdell, outgoing president

Board Members or Board Chair (recently developed at Board Retreat, 4/27, more to be added)

- Board Retreat: Tim and Board discuss/draft “what success looks like” at time intervals; review roles and responsibilities, board meeting mechanics
***RECOMMENDATION: facilitated by Mary Spilde*
- Coffee time, 1:1 with board members
- Tim and his family feel welcomed and content
- Tim and Joanne have adequate time to connect
- Media coverage remains positive

- Tour of each zone: 5/31 commitments: Denice will schedule 1:1 coffee time with each board member (July/August); Denice and Lori will coordinate meetings with board members and a few key officials for later in the summer)
- Guided Pathways – understands CCC’s timeline
- Positive “landing” with college staff, relationships begin well

Foundation

Vice Presidents

Leadership Cabinet – to be developed during June leadership cabinet meeting

College community – could be developed from Amanda’s listening tour

➤ **Schedule of activities**

Edit this

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- For each event, add desired results, min specs, and who owns promise
- Add new events as people commit to them and as we flesh out other sections of this plan

July 2	Tim Cook’s first day
July 9	Exec retreat: to be confirmed?
July 10, 9:00 – 12:00	Drop in / open house welcome in executive offices
July 11, 1:00 – 4:00	Drop in / open house welcome in executive offices
July 25	Board meeting
August 1	Leadership Retreat: teambuilding
August 20 (all day)	Corporate Challenge and ParTee on the Green Foundation event Purpose: Fundraiser <i>*CCC’s 25th Corporate Challenge golf tournament will celebrate 25 years of student support and introduce Dr. Cook to many corporate and community partners in the county, including many of the contractors/architects/engineers that work on the bond projects as well as influential contacts of the CCC Foundation Board of Directors. Dr. Cook will work with the Executive Director and Major Gifts Officer to meet each of the attendees as they golf, and he will have a brief speaking role at the ParTee on the Green in the evening.</i>
August 25, 9:00 – 1:00	Board Retreat: roles and responsibilities, board meeting mechanics Amanda has emailed Mary Spilde about facilitating
Aug 27-31	Tim Cook on vacation

Sept 5	Foundation Executive Committee Meeting 8:30-10:00 AM, CC-126 Purpose: Brief College Update
Sept 11-12	Leadership Retreat: prioritize and prep for upcoming year
Sept (mid)	Reception at Foundation Board Presidents Residence, evening Purpose: <i>Cultivate</i> <i>*This will be a small reception welcoming Dr. Cook and introduce him to a different group of constituents than those who attend the Corporate Challenge. This event, hosted by Foundation President and previous mayor of Oregon City, Alice Norris, will have 20-40 of the Foundation's top donors and community partners. This event is specifically for Dr. Cook to meet key contributors. Dr. Cook may want to say a few words.</i>
Sept 17	Foundation Board Meeting 11:30-1:00, likely in ITC Purpose: Brief College Update

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Possible activity	Request
Welcome reception for Tim hosted by Joanne. JT willing 5/31: discussed the possibility of the Foundation hosting an ice-cream social in the sculpture garden; date TBD	Amanda ask JT to offer to Tim / summer date? Lori committed to checking with Foundation
Develop a Support Network (internal and external members)	
Meeting: Tim meets with three VPs (David, Alissa, and Paul), both with Joanne and without her	Tentatively set for July 9; request facilitator?
Meetings: Tim has one-on-ones with three VPs	
First meeting(s) with Collaborative Learning Network	
Relationship building between leadership cabinet and Tim	

Retreat with Leadership Cabinet in late August or early September	Dates identified
Leadership Summer Summit	
New Leader Integration: VPs and Leadership Cabinet	
Meetings with Association Leaders: FTF, PTF, Classified, ASG	

Take a campus tour with the Welcome Center	
Watch online orientations	
Attend Clackamas Rep production	
Attend summer in-service classes	
Bond Projects tour	
Harmony tour	
Wilsonville tour	
Oregon City tour, including the tunnels	
Visit the Farmer’s Market	
Go through an advising center	
Ride along with Campus Security (Tim’s idea)	
Work a shift with custodial staff (Tim’s idea)	

➤ **Materials**

Item	Intended Audience	Distribution process or policy	Who owns what promise
Master Calendar by phase (chunks of time)			
Strategic Assessments			
Timelines: bond projects, accreditation, assessment, and guided pathways			
Key email threads for key topics			
Copy of Joanne’s calendar Annual planning calendar and cycle			

Fall Term

➤ **What success looks like:**

Tim Cook, incoming president

Board Members or Board Chair - *developed during April retreat, to be revised in consultation with Tim*

Foundation – TBD

Vice Presidents -TBD

Leadership Cabinet – *to be started in June and continued with Tim during summer*

College community – *could be developed from Amanda’s listening tour*

➤ **Schedule of activities**

In-service Week Sept 25 Sept 26 TBD	Tuesday morning in-service In-service Association lunches In-service BBQ
Oct	Attend College Council 12:00-1:30, CC-127
Oct	ITC Grand Opening
Oct (mid)	The President’s Circle Event / Foundation (luncheon or dinner, TBD) Purpose: Stewardship and Fundraiser <i>*The President’s Circle is a special fundraising giving level for those who donate \$1,000 or more annually to the CCC Foundation and include all types of donors – community members and organizations, retirees, staff, alumni, corporations, etc. In an effort to retain and steward these members and entice others to join before the year is over, the Foundation will host an event in their honor. Dr. Cook will have a speaking role at this event.</i>
Nov	Classified Appreciation Event
Nov 7	Foundation Executive Committee meeting 8:30-10:00 AM, CC-126 Purpose: Brief College Update
Nov 19	Foundation Board Meeting 11:30-1:00, likely in DeJardin 233

	Purpose: Brief College Update
Dec	All-Staff recognition

➤ **Additional Activities To Be Developed**

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Possible activity	Request
Installation ceremony and reception	
Volunteer in Welcome Booth (first week of classes)	
Participate in an ASG Welcome Week Activity	
Attend wrestling crab feed	
Attend Fall Career Fair	
Attend fall Theatre Department fall production	
Volunteer in Cougar Cave	

Additional Information

➤ Possible groups:

[Amanda, please summarize each of these ideas using the article/book we read. Include the purpose of the group, who would be in it, **DONE!** what exactly they would be committing to if they agree to join, how to decide which people to invite as members, and what promises it would own. **STILL TO DO.** For Transition Team, you probably already know answers to these questions, but a good opportunity to clarify. You could put me as a consultant to transition team.]

1. Collaborative Learning Network – a group of individuals recognized for their “integrity, openness, and institutional knowledge” and that present a wide range of perspectives, including those less popular and understood. Members should have deep credibility with their peers and other groups, have both institutional knowledge and affection, and have the ability to speak truth to power in a collegial and honest way. Group formation: ideally administrative and association leaders would, working together, identify 10 or so individuals across the college who are NOT senior leaders and are not the usual suspects. Meeting schedule: Recommended 1:1 president and each member during the first 30 days or ASAP to a) build a relationship with each member of the network and 2) teach/learn about the campus. A follow up “reality check” meeting can be in 2-3 small groups or all together to a) learn what is going well on campus; b) learn about areas/things the new president need to pay attention to; c) hear advice from the group; d) ask questions of the group. *This is not a problem-solving meeting; rather it’s an information-sharing meeting. 5/31 update: confirmed; Amanda committed to drafting a charge, membership list, and meeting schedule to share with Tim, Lori, Denice and others TBD. Need to determine outreach/invitation, dates of first meetings.*
2. “Adhocracy” Map – the college’s “adhocracy” are the informal leaders who get stuff done. Once identified, the new president will have a list of the real “doers.” Group formation: A detailed exercise for mapping the “campus adhocracy” (and involving as many as 30-50 leaders) is described in *Presidential Transition Guide* (Gaval and Sanaghan 18-23). Meeting schedule: A few meetings during the first year (small groups meeting with the new president) to discuss a) what’s going well; b) what needs his attention; c) what needs his focus; d) challenges on the horizon. *5/31 update: holding off on this group; decided it was both complex and onerous; can fold some elements into the learning network.*
3. Transition Team – a group of individuals who will steer the campus through the transition by planning, coordinating, and communicating events, supporting the key participants in those events, and keeping the college informed and engaged. Group formation: college-wide representation, including 2 admin; 2 FTF; 2PTF; 2 classified staff; Harmony rep; Wilsonville rep; Lori, Jen Miller, and Amanda. A student? Meeting schedule: as needed. *5/31 update: did not discuss; should definitely revisit.*

➤ Possible structures

- Email distribution lists to add Tim to
- IT structures to allow Tim to get connected
- Transition calendar (Outlook) / Tim has an email and calendar

➤ Materials

• Methods of dissemination

Current process of disseminating

- The current President and VPs individually decide which materials to share with Tim and email to him

Proposed process for disseminating

- Transition team own key promises
 - Sending materials to Tim and—exceptions: personal communications that President, Board chair, and VPs want to send Tim
 - Distributing materials to others
- Transition team invites requests from Leadership Cabinet, Board, and association leaders (and others?) of which materials to send
- Transition team decides which materials to send and works with Tim on how to sequence them

Note: “sending” could include creating a special directory of electronic files

• Materials (incorporated above, but left here for future reference or reorganization)

Include for each:

- Intended audience
- Distribution policy
- Steps to create and who owns promise

Presidential Transition Guide by Gaval and Sanaghan

Photo org chart

Briefing Packet and Fact Book

Master Calendar by phase (chunks of time)

Strategic Assessments

Video of Joanne’s talk to Leadership Cabinet

Timelines: bond projects, accreditation, assessment, and guided pathways

Key email threads for key topics

Relationship Map

Adhocracy Map

Copy of Joanne’s calendar

Annual planning calendar and cycle

Tips for relationship conversations

*Transition Guide (leveled): Board, President, Organization, Individual (per outline in JT's office)

*Initiatives: Board Goals and Internal (Amanda is creating from outline in Joanne's office)

- **Materials requested by Tim**

- **Communication Plan**

Consider folding this (or part of it) into this transitions plan – Lori is working on this.
(Dates and content)

- **Ideas to be developed further and incorporated**

Exec and PVP Agenda Items

New Leader Integration:

VPs and Leadership Cabinet

Internal Activities & Events

(some included above)

➤ **Spring term 2018**

June

- ELC Discovery Day
- Graduation

➤ **Summer term 2018**

July

- Take a campus tour with the Welcome Center
- Watch online orientation
- Attend Clackamas Rep production
- Attend some summer inservice classes
- Bond projects tour
- Harmony tour
- Oregon City tour (including the tunnels)
- Wilsonville tour

August

- Visit the farmers market
- Go through an advising session
- Leadership Summer Summit

➤ **Fall term 2018**

September

- Tuesday morning inservice
- Inservice association lunches
- Inservice BBQ
- Volunteer in a welcome booth
- Participate in an ASG Welcome Week activity
- Attend wrestling crab feed

October

- Attend College Council
- Attend Fall Career Fair
- ITC grand opening

November

- Theatre Department fall production
- Volunteer in the Cougar Cave
- Classified Appreciation event

December

- All-staff recognition

➤ **Winter term 2019**

January

- MLK Day of Service

February

- Winter inservice
- Skills Competition

➤ **Spring term 2019**

- GED/ABE graduation
- Degree/certificate graduation
- Cougie Awards

➤ **Any time**

- Attend a BERT training
- Drive around campus in a golf cart and hand out swag/snacks to students
- Attend athletic events
- Attend music concerts
- Attend gallery events
- Attend STEM talks
- Visit each department during a staff meeting (similar to what David did this year)
- Get behind-the-scenes with campus services
- Attend Full-time Faculty Association meeting
- Attend Part-time Faculty Association meeting
- Attend Classified Association meeting
- Attend Admin/Confidential Association meeting