# PREFACE

# How to Use This Workbook

You have probably attended generic leadership workshops that provide you with a lot of ideas in the areas of leadership theories, leadership styles, networking, change management, time management, and other related topics, but they do so without discussion of your skills and experience. Other workshops will help you focus on you and your skills and experience, which are important; however, you are just one part of a multifaceted landscape that determines success.

The approach of this workbook is to embed practical information and self-reflection in a framework that helps you assess the intersection of the macro and micro context in which you will lead. Self-knowledge and practical skills are important, but they exist and are applied within a context. Context is everything. This workbook will help answer the question, "How do you use practical information and knowledge of your skills and experiences to be a successful leader within a given context?"

The purpose of this workbook is to help you create your own unique roadmap for your first three to six months in your new leadership role. Based on our experiences, leaders new to their roles have very little time to lay a strong foundation for their tenure. Much like a sprint relay, your time in the role is short—and it is dependent on the history you inherit. Don't squander this precious time at the start; once you accept your new position, be prepared to 'hit the ground running' from the moment you begin, and to use your brief honeymoon period to create the greatest possibility of success. This workbook will provide you with a process that, once completed, will result in the creation of your own unique three- to six-month roadmap.

Whether you are starting a new position at a different institution or are being promoted internally, determining how to approach the numerous challenges and opportunities presented to you can be overwhelming. If the thought of tackling all of the material in this workbook seems daunting, the assessments of the macro and micro context, self-reflection questions, case studies, and activities can be bundled in a variety of ways to create learning capsules customized to meet your needs, interests, and schedule. Additionally, the micro context questions can be used to help job seekers scan and assess an institution during the interview process. Further, assessing the intersection of the macro and micro context can aid you in setting goals and developing plans for your unit/institution. Finally, different sections may become more salient as duties expand or leadership roles grow or change, so you can use this workbook over time.

Each section provides some broad considerations and key concepts. We ask you to then spend some time reflecting. Be honest and candid with yourself, as these answers will provide some important foundations for the unique roadmap you will develop at the end of the workbook. We also provide some case studies to illustrate situations that you may encounter. (Please refer to the Appendix for a description of Jackson Rockgrove

University and the cast of characters you will encounter in these case studies.) Finally, we provide some questions that, once answered, will create a working document that you can use even before Day One.

This workbook is organized into seven sections. As we developed the ideas for this workbook and reflected on our time spent in higher education leadership, we found that there are two organizing categories to help with effectiveness: *people* and *processes*. Of course, these overlap significantly, because people design and work within processes. Even so, some of the sections will focus more on working with people as the most important resources, and others will focus more on the use of good processes. Lastly, as we reflected on leadership, we also wanted this workbook to move from ideas to application—that is, to aid in your creation of a unique planning tool, or roadmap, for your individual situation—for your leg of the relay.

You will find that six of the sections expand on the two categories of people and processes, and we will describe each section in a bit more detail below. If you want to focus more on people, you may want to start with Sections Two, Three, and Four. If you are interested in processes, Sections Five and Six may be useful. Section One provides an overall framework, and Section Seven, once completed, will result in your unique plan, created by and for yourself.

We use the metaphor of a sprint relay race to describe time spent in a senior leadership role. **Section One** introduces you to this model and the parallels this metaphor provides. Research tells us that the time spent in any leadership role is decreasing, which creates a need for an efficient and effective start. Perhaps counterintuitively, it is also the time to begin thinking about your legacy even before or as you assume the role. And, as in a relay race, you are part of a team, which includes what you inherit from your predecessor and the context of the institution in which you will be working. This initial section will help you to prepare for your time in the role, offering an overview from start to finish, from the time of receipt to the handoff of the baton.

**Section Two** explores the power dynamics of leadership roles, sometimes referred to as "politics." The nature of power dynamics is that they exist both interpersonally and institutionally. This workbook, and Section Two in particular, examines both, as well as the intersection of the two. Interpersonal power dynamics are inherent to and permeate leadership. We will examine both how to be aware of and how to manage these dynamics in order to be effective—including how to handle boundaries, both up and down the reporting structure. Some leadership development focuses only on the interpersonal. This section goes beyond that, and takes a deeper dive into how climate, institutional norms, and power dynamics will impact your leadership, and how these factors will need to be assessed quickly. Embedded in these are equity and inclusion considerations, which are introduced in this section and then woven in further throughout the workbook.

Once you examine the power dynamics of Section Two, **Section Three** will expand on the *people* aspects of leadership. This section concentrates on developing mostly one-on-one relationships. You will likely be building relationships with both internal and external constituents. Identifying important constituents early in your leadership leg of the race will help you to cultivate important relationships. Given the existing power dynamics, this section also explores developing others' trust in you and determining whom you can trust. Shared governance

is increasingly important, and this section elaborates on how to best utilize it to accomplish your goals for your unit and for the campus as a whole.

**Section Four** examines building teams. Sometimes your unit and the institution will have all the talent required; other times, talent will need to be cultivated or developed. This section will explore assessment of existing talent, and how to create it where there are gaps. Professional development can be expensive in both time and money, so this section looks at both targeting what is needed and how to provide it effectively. The effectiveness and usefulness of work done in committees and task forces is greatly affected by team membership, so this section also provides guidance on building these groups, in addition to those elected by shared governance.

Understanding shared governance is essential to effective higher education leadership. **Section Five** investigates the underlying processes for engaging in shared governance processes effectively. Using a data-supported decision-making model assumes the availability of trustworthy and transparent data. This data must include the budget, both revenue and expenses, and how resources are allocated. The ability to conduct continuous improvement depends on assessment of student learning, and evaluation of programs through accreditations or other methods. These processes are covered in this section, along with delving into each as they specifically intersect with shared governance processes.

**Section Six** concludes the sections focused on process by examining operating essentials. These include communication strategies, both daily and in crisis; how to review and update policies and practices; and finally, coming full circle, your initial hopes for your time in the position. As you prepare to leave your current leadership role, this section asks you to revisit the hopes and plans you acknowledged in Section One, at the beginning of your part of the relay. As you prepare to hand off the baton to your successor, Section Six helps you to consider what your likely legacy will be.

Finally, **Section Seven** will assist you as you combine and synthesize your work in the other sections. As you compile the tasks you identified on the various roadmap worksheets embedded in Sections One through Six, you will see that there is more to do than is humanly possible, especially in the probable short time frame of your acclimation and orientation to the role. This section will help you to see all possible issues in the aggregate and will reinforce the need to be realistic in setting goals. It will also help you to pick the most important tasks to accomplish in the first six months. This is crucial to good self-care and will enable you to be more effectively focused in your work. It will also be a good reference for you to revisit every six months in order to reassess—to omit items that are not important or urgent, and to add others you might have missed. The unique roadmap you create can serve as an organizing touchstone for your entire leg of the race, from receiving to passing the baton, and will increase your likelihood of winning that gold medal.

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