



***SMART TRANSITIONS:* Consulting for Executives in Transition from StevensStrategy**

Stevens Strategy is a full-service consulting firm specializing in managing the process of strategic change in colleges, universities and schools. We offer professional services to the leaders of these institutions in the areas of Strategic Planning, Strategic Governance, Focused Strategic Analysis, Financial Analysis and Planning and Institution-wide Policy Development. Our consultants have extensive experience serving colleges, universities and schools—including positions as present and former trustees, presidents, faculty, vice presidents and other senior staff—each with a particular area of expertise in college, university and school leadership and management. Our clients include independent and public institutions from the largest universities to the smallest colleges and schools in America and throughout the world.

Smart Transitions is a Stevens *Strategy* Consulting Service for executives in transition, led by Jeanie Watson and Ellen Hurwitz, highly experienced college and university presidents with strong academic backgrounds and a deep commitment to facilitating successful executive leadership transitions.

When a current executive leader leaves the institution and a new one is appointed and begins his or her tenure, it inevitably initiates a change-process. Ideally, this transition in leadership is well-thought-through and well-managed, so as to be strategic, positive, and productive: for the out-going leader; the in-coming leader; and, ultimately, for the institution. *Smart Transitions* specifically focuses on the executive leaders in these times of leadership transition. We are the sounding boards, questioners, and conversation-partners, helping the executive leader navigate his or her transition within the historical, cultural, and political context of the institution.

Smart Transitions offers an advantage that enables a college or university to attract and retain effective leaders while exemplifying best practice in managing timely and well-executed transitions.

The Advantage of Transition Executive Consulting:

College and university executives come and go, not always in ways that facilitate institutional growth and stability. All too often leadership change is abrupt and unexpected, resulting in dysfunctional behaviors across the campus, a decline in institutional support, and a less than favorable environment for any future leader. Smart, thoughtful transitions, on the other hand, yield institutional transformation and growth. *Smart Transitions* provides services at critical junctures of leadership transition:

- the announced departure of the current executive leader;
- the time after the naming of a new executive leader, but before his or her “start” date; and
- during the new leader’s first year.

Acknowledged and respected within the corporate and business community as “executive coaching,” counsel to the executive is seen there as an effective way to enhance the abilities and performance of senior executive leadership. Only recently, however, have higher education and other not-for-profits begun to use this process to facilitate the successful transition and further develop the leadership skills of their executives. We believe this trend will only continue to grow, since in this time of rapid—often turbulent—change, the role of higher education and other non-profit leaders becomes ever more challenging. And, thus, the need for confident, perceptive, forward-looking leadership is imperative.

Experienced, visionary coaching for executives in transition not only enhances leadership transitions for the Individual leader, but also helps ensure institutional strategic health and growth during times of transition.

SMART TRANSITIONS: Process

First, *Smart Transitions* and the executive leader develop an agreement as to the scope, goals, and parameters of the engagement. Then—whether the executive leaders with whom we will be working are transitioning out of their current position, into a new institution, into a new role within the same institution, or are simply encountering new and complex challenges—*Smart Transitions* has a three-part process: an environmental scan; followed by one-on-one consulting sessions; and, finally, an end-of-engagement wrap-up and consulting session.

I: Environmental Scan:

Since knowledge of the institutional history, culture, and context within which the executive leader will work is crucial for the most successful executive leader / executive consultant relationship, *Smart Transitions* is committed to conducting an appropriate organizational “environmental scan” before any individual consulting sessions begin. The Environmental Scan is normally part of all executive consulting agreements, during which *we* will do some or all of the following, as appropriate:

- Review relevant institutional materials, e.g., accreditation report, institutional strategic plan, organizational structure, financials, search prospectus, and any other relevant materials
- Talk with the search consultant
- Develop a focused questionnaire for an on-site visit
- Conduct the on-site visit, interviewing e.g., board chair, search committee, executive leader’s team, and other relevant individuals

This is typically a 4-5 day process.

II. One-on-One Executive Consulting Sessions:

These sessions can occur in a variety of agreed-upon formats, e.g., in-person and on-site, in-person and off-site, or *via* telephone conference or skype, with “check-in” calls as desired. Some typical times during which *Smart Transitions* may be of service to executives in transition include:

- Executive leader transitioning out of the institution:
- New executive leader before campus arrival:
- New executive leader’s first year
- Executive leader encountering unexpected challenges

One-on-One Executive Consulting Sessions will vary as to the number of days spent, but usually 3-8.

III. End-of-Engagement Wrap-up and Consulting Session:

The “wrap-up” may address such items as goals accomplished, perceived challenges, and suggestions for the future. It is a confidential and integral part of the final in-person executive consulting session. The End-of-Engagement Wrap-up and Consulting Session is a 2-day process.

The total number of consulting days for this three-part process is normally 9-15 days.

SMART TRANSITIONS:* **Methodology and Philosophy*

We work with our executive leaders one-on-one, over an agreed-upon length of time, during specific times of transition.

As executive leaders move into new positions of responsibility, they will inevitably encounter new and unexpected challenges. They will also learn that it really is “lonely at the top.” Those with whom they can be completely candid about leadership’s complexities, opportunities, and challenges will become fewer and fewer.

At *Smart Transitions*, we can help fill the conversation, analysis, and sounding board “gap” at the top.

We are committed to the self-awareness, growth, and success of the executive leaders with whom we work. We are also committed to the success of the institutions that they—and we—serve. These dual commitments are best achieved through confidentiality, trust, and a high level of expertise. To that end:

- We are facilitators, listeners, and questioners.
- We are sounding boards, bringing an informed, yet dis-interested, objective perspective to a wide range of issues related to organizational dynamics and political environments, options for strategic organizational growth, and personnel management.
- We are catalysts for the leader’s ability both to imagine future possibilities and to plan and execute the actions that will make possibility a reality.

We believe that great leaders “lead from strength.” We believe that even great leaders can benefit from having a formalized executive consulting relationship with another experienced, successful professional who is familiar with the environment of executive leadership. We believe in a client / executive consultant relationship built on trust, a relationship that encourages an executive leader to take advantage of his or her strengths to achieve success.

SMART TRANSITIONS:* **Consulting Team*



Ellen Hurwitz is an award winning professor of history, author and past president of three institutions of higher learning: Albright College, New England College, and American University of Central Asia in Bishkek, Kyrgyzstan where she is President Emerita and Executive Director of its Foundation. She also served as Acting President at Pine Manor College. She is a Senior Fellow at the Institute of International Liberal Education at Bard College, scholar in residence at the Winter Park Institute of Rollins College, and senior consultant with Stevens Strategy. Dr. Hurwitz has been at the forefront of interdisciplinary learning in the humanities and social sciences and has developed seminal programs at five universities. She has brought her international, multilingual communication skills to the development of learning partnerships and dialogues across diverse political, national, and religious climates. Since her return to the United States in August, 2011 she has been speaking and writing about leadership at an American style university located at the crossroads of civilization, where efforts to develop democratic institutions are challenged by habits of mind and relationships with Russia, Iran, Turkey, China, Afghanistan and the United States. She is also engaged in the development of a cutting edge university, leadership coaching in the US and abroad, and in reflective writing on leadership and the liberal arts in the United States and overseas. She holds a BA from Smith College and an M.A. and Ph.D. in Russian and Byzantine Studies from

Columbia University, where she was appointed Chair of the University Seminar on Slavic History and Culture.



Jeanie Watson has held positions of leadership and responsibility at a broad spectrum of institutions and organizations: president for nine years at Nebraska Wesleyan University; dean at Tulane University, Hamline University, and Southwestern University; teaching faculty at Rhodes College, Gustavus Adolphus College, Stonehill College, the University of Nebraska, and Marshall University; director and higher education specialist at TIAA-CREF; and associate vice president of development at the University of Minnesota Medical Foundation. As president of Nebraska Wesleyan, she oversaw the restructuring of the Board of Trustees; academic program development and growth to include masters degrees and a pre-collegiate concurrent enrollment program; the design and implementation of a forward-looking strategic plan; a doubling of the student headcount; and the construction of new campus facilities, as well as the establishment of a satellite campus in Omaha. Dr. Watson has also been active professionally on multiple national higher education boards and committees, e.g., American Council on Education (ACE); Board of Directors of the Council of Independent Colleges (CIC); the National Association of Independent Colleges and Universities (NAICU); University Senate of the United Methodist Church; Board of Directors of the National Association of Schools and Colleges of the United Methodist Church; the Executive Board of Higher Education Resource Services (HERS); and the NCAA Division III Presidents Council. She has also consulted at colleges and universities across the country. She was a post-doctoral Visiting Scholar at Columbia University and studied at an NEH Summer Seminar at Princeton and the New Presidents Program at Harvard. She received her Ph.D. from Ohio, M.A. from Midwestern State, and B.A. from Baylor. She is the author or editor of six books and numerous articles.