

Facilitating a Smooth Transition to a New UCEDD Director

- Framing the human nature of transitions, using developmental lens of transitioning for newer and experienced directors. Retirement is also a developmental milestone.
- Things we know about developmental stages – we go through dysregulation, disorientation, consolidation – takes time. Be kinder and gentler with all in process.
- TA request – help UCEDD Director’s supervisor better understand UCEDD role and structure, as the leadership transition is an opportunity to educate
- Navigating disagreement and conflict that arises between incoming and exiting Directors required a trusting relationship to be able to navigate that.
- Question may be less about “what am I supposed to do” but “who am I in this transition”?
- How long does it take for the transition process to complete, for the new Director to be fully in the role without intrusion from exiting director? One person’s experience of moving into Director position from within the ranks: Early on, talk about role of new director in the UCEDD. First year, exiting director stayed on part time and was helpful in navigating, translating, mentoring. In second year, had some ideas that didn’t align with vision of exiting director – maybe there was a mutual assumption was that new director would do things the way the old did. This became crux of conversation – exiting director wanted to save new one from making same mistakes, new director clarified she wanted to make own mistakes. Third year, exiting director truly left, which opened up a new space. Developed core grant application which became an opportunity to fill that opened space.
- Different experience for new director coming from external. Need to think about the larger context, culture of Center and state – what will serve the institution? Does it need an interim person? No clear answer – is situational.
- Is it better to have previous director working for a while or not? Also situational. Hard for new person to get any agency if the exiting person still acts as director.

- Director is such an HR-heavy job. Many didn't realize this ahead of time. Incoming directors should ask, ask, ask about requirements of the job. Might not know what questions to ask though.
- What to ask? Ask exiting director: Tell me about the job. Tell me about the deals you made, in and out of the center.
- Took three months to not change anything. In that time, got to know staff in 1:1 convos about (1) what's your job here, (2) what do you want to tell me, and (3) what don't you want to tell me. In this way, learned about all the bodies and how deep they were buried.
- Took 3 years to navigate – this was most frustrating part of entire career.
- Hardest part was to get respect from other statewide partners, esp those who wanted a man. Hard to get credibility as a woman. This is hard for new person who starts after someone who has such status.
- Transition plans helpful for internal staff, and also for external partners.
- Watch transition of new provost, in planned transition of leadership. This provides lessons to learn from.
- One new director received a detailed transition plan and onboarding plan. 3-6 month spreadsheet of everyone needing to meet, every document to look at – very helpful!
- Most transition leadership says exiting person should get out of the way. Having exiting person available to help introduce to stakeholders, get to know lay of land and landmines, this should be a short period however, and a plan established for when to leave. Difficult to have a conversation asking exiting director to truly leave. Don't want to find self in position to harm relationships. Retired one can say "I am here, reach out if you want." Don't linger.
- Knowing who the Director's supervisor is in the system, is opportunity for outside consultant to come in who is aligned with that person. Consultant can do top-to-bottom analysis that is informed by AUCD network. Very helpful, note is time consuming and needs advance planning. Also had DD Network to talk with supervisor, alongside consultant, here are the people and players and partners – this helped tremendously.
- Being able to call in voice from outside, from another nationally recognized & competitively awarded Center to participate in prep, process, etc. Helps get leadership to be supportive.

- Transition creates opportunity that doesn't otherwise exist – to re-examine things, both formally and informally.
- TA: update doc for UCEDD Director searches, to include questions that should be asked of Director candidates.
- Part of job of new director is to honor legacy of past. Tell lots of stories, share the culture of organization. Document in writing – who was the director, what years, what efforts and programs succeeded when they were there? Tools like Photovoice can help – so much of the programs we do are in response to where the community is at the time. Culture is a living breathing thing that the Director takes care of for as long as sitting in that seat. Keep pictures of previous directors, invite previous director to events to keep history alive. Panels on walls with images from history of center. UCEDDs have sense of connectedness to folks beyond the typical suspects in the university – this often gets lost in transition because the relationships shift – but powerful to see the foundation the new person is building on.
- Legacy from previous director can be donation, scholarship named in honor.
- How to honor history, stories, cultures when coming in as external person with new challenges and opportunities? How to move forward without seeming critical of past director? A UCEDD is a plane in flight and the weather is constantly changing.
- Taking/giving self time for transition to occur.
- Take into consideration the timing of the 5-year core grant application. If new application due early in tenure of new director, don't change too much so early on. Give time to understand culture, history, prepare all to embrace/heal lead change to come in next 5-year cycle.
- Why would assoc director want to be director? Make change in state, have bigger impact. Is position of privilege, a vision emerges, more influence and sway in state. Need to decide if it's worth the headache of the HR and budgets and spreadsheets. Learn as much as you can about rules of engagement, meet the stakeholders in the office of diversity, business office, HR, administrators, etc. to inform decision.
- Inform ALL staff of center, including student workers, of the upcoming change, process, help them understand what would be gained or lost in the transition.

- Models for transitions? Some UCEDDs have co-director models – how does that work? Consider splitting by function. Clarify the roles well. Can break up functions by administrative tasks, or by community/university. Won't work if are competitive in power. Consider deputy or associate director role for administrative role.
- Build the best pathway for future development of the UCEDD. Choose your battles. Lead with integrity.
- People are afraid of change because worried about losing something. Opportunity to bring in vitality. No one will come in with the same level of expertise that the exiting director gained over their time in the role.
- If taking on additional roles (UCEDD Director, and LEND Director, maybe also director of an institute on campus), attend to ensuring each project has adequate leadership without being spread too thin. Institute can provide better infrastructure for UCEDD/LEND by offsetting their low indirect cost.
- Tricky to find identity & culture – have had retreats, strategic planning, etc. as new directors.
- Gave clear direction to stop saying “the way we used to do it is...” to clarify that the new director has the new way of doing things. Facing this is also part of facing loss of exiting director. Folks may threaten to quit – be prepared for this. And this is OK. Considering transitioning administrative assistant along with director.
- Recruiting directors and associate directors – experiencing poor pool of applicants. May be a result of having so many recent or upcoming retirements.
- Current resources on URC:
<https://www.aucd.org/template/page.cfm?id=763>