



ROLE TRANSITION - QUICK TIPS

Five quick tips for a successful role transition to a researcher-and-leader.

Know Why You Accepted

Self-knowledge is invaluable when you accept an academic leadership position. Why did you say, “Yes, I will serve”? From a sense of responsibility to the next generation of scholars? To improve the curriculum or research profile of your unit? To give back to the institution that shaped you as a scholar? To increase your retirement income? There can be more than one reason. Focusing on why you accepted is key to the transition from scholar to scholar-and-leader for your term of service. Being chosen to lead your unit recognizes your accomplishments as scholar, as colleague, as mentor, and as teacher, and gives you a chance to use your skill in new ways. Early on, articulate two or three (not more!) goals for your term of service. The exercise of identifying and writing down your goals is time well spent to help you focus on why you are serving, and stay centered when you hit bumps in the road.

What Kind of Leader Does Your Unit Need?

Effective leaders are stewards for the good of the whole. Your transition is a transition for everyone in the unit. What it takes for a new leader to be effective depends on the people, culture, history, and most pressing challenges in the unit. There is no "one-size-fits-all" approach. So, where should you start? First, talk to people with expertise on the issue and find out what has worked before and what are the challenges you are facing today. second, think about goals, resource allocation, and delegating. Third, ask your predecessor or someone who knows the rhythms of your institution about annual deadlines and the requirements you must meet. These likely include promotion and tenure, curriculum, and budget submissions to the next level up. Get those deadlines on your calendar early and plan around them, as you are responsible on behalf of your unit for those submissions.

Find Your Own Leadership Style Based on Strength and Weakness

Your first few months may be tough. Use this transition time to learn about yourself and to grow into the new responsibilities. Leaders are not born--becoming the best leader you can be is a lifelong learning process. For example, listening well, persuading and motivating through a shared vision, building rapport and allies, and establishing efficient time management strategies are skills that are key to effective leadership and that can always be picked up and sharpened in process. What are your strengths and weaknesses as a leader, and where would you like to improve? You already have knowledge, skills, or abilities that serve the role as well as domains in which you would like to improve. You will develop your own unique leadership style. By being patient with yourself, your own leadership style will evolve as you face incoming challenges and opportunities.

Seek Advice Wisely

Leadership can be isolating. Your relationships with colleagues will change once you are in a leadership position. Nothing affects a relationship like being responsible for evaluating another person's work and providing performance feedback. Your new role requires you to maintain confidentiality on personnel matters and other sensitive subjects. It will not be appropriate to share information, or to ask for advice on certain



issues, as you may have been in the habit of doing in the past. When you get advice, ensure that it is from someone who can do so confidentially: there will be regulations and/or laws covering what you may say about student and personnel matters, so be especially careful on this front. Now is the time to identify where you can discuss confidential issues and receive advice without crossing professional boundaries. Explore a support group with leaders in similar positions such as an organization of your peers or a group of unit heads in your disciplinary society.

Come to Terms with Your Discomfort

You will inevitably face uncomfortable situations in your new role. You may feel inadequate to make career-impacting decisions about others, to conduct personnel evaluations, or to withhold confidential information from longtime colleagues or friends. Being mentally prepared for unfamiliar moments by anticipating those aspects will aid your long-term well-being as well as productivity. Devise strategies for those issues, for example, by identifying resources for wise counsel, ways to give yourself time before reacting, and/or ways to recharge personally.

One helpful tool is to have ready some words, personal scripts, for some of the predictable moments that will arise. Some approaches others have found helpful for setting and maintaining professional boundaries with colleagues and members of your unit include:

SAMPLE SCRIPTS
for maintaining
boundaries

**Information
sharing**

"Yes, we are friends and I hope you can understand there are things I cannot discuss"

"That's not something I can discuss with you, as much as I'd love to have your perspective. My duty now is to follow the university's regulations/the law."

**Performance
feedback**

"This is awkward for both of us because we are friends and I value that relationship. My duty in this role is to give you candid feedback and I do that because I am interested in your success and care about you."

Adapt these examples to your own personality, situation, and voice, and consider other moments where having considered words in advance would be helpful.

