Role Transition: Check List of Items

Here are some items to consider as you take on a leadership role. Adapt as appropriate to your unit and institution.

Email Protocols:

1. Be thoughtful and purposeful about topics you take up in email and those you pursue in person. Think seriously about what is handled well in email (short, informational exchanges) and situations that are complicated and aggravated by email; strive to keep email to routine matters and to handle complex or contentious matters in person wherever possible. Keep in mind the "forever" paper trail that email creates.
2. Create or secure access to an position-related e-mail account like "deptname@uni.edu" that goes to both you and a departmental assistant or administrator so routine departmental matters and scheduling that you would pass or delegate to someone else is seen by them in the first instance.
3. Try to separate your personal/research e-mail from the account you use for departmental business. Depending on institutional policy (if any), if appropriate, create a personal email account outside the university domain for all your personal communications. Make serious efforts never to conduct college or university business on your personal account so you have some separation of your roles. (Please note: Any email account in which you conduct institutional business, including your personal email, and any institutionally-owned equipment, will remain subject to freedom of information requirements at most, if not all, public institutions).
4. Articulate how you plan to use your administrative email account. If people send department head/chair business to your personal email, get in the habit of forwarding it to the departmental address so your administrative assistant or relevant others stay informed and can support and help your work. Let senders know that this is how you intend to conduct departmental business. Respond only from your university email account.
5. If you have a routine for batch addressing email at certain times, share that information to help set expectations for your responses like "I will respond to emails first thing in the morning / within 48 hours / whatever." If you do not have such a routine, consider establishing one.
6. Familiarize yourself (or create if it does not already exist) the group e-mail addresses that can reach important subgroups, like "faculty_depart@uni.edu", "gradstudents_depart@uni.edu", "undergrad_depart@uni.edu", etc. Learn who has access to each list. For "faculty," does that include only resident faculty in your unit, or does it includes all affiliated faculty, such as those with courtesy appointments? Does it include all contingent faculty, or only tenure stream faculty? These are baseline things to know, so you know who your audience is when using each list.

Time Management:

1. Find and read your departmental bylaws, and identify other relevant policies. Know what is in your department's bylaws. Locate all policies you are expected to enforce, find and read those as well. If your institution has policies that apply to your new role, outlining responsibility and authority, seek those out and become familiar with them.
2. Get all institutional deadlines and expectation on your calendar, This includes promotion and tenure dossiers, budget requests, important standing meetings, etc.

3. If you hope to hold time for your research, state that at the outset and let others know your planned schedule. This time will only get harder to create and protect, so establish expectations from the start if at all possible.
4. Build in balance. Take some time reflect and consider whether there are activities you can limit as you take on a new role with added responsibilities. Think about where you might be able to achieve some efficiencies, or to preserve energy and time to address items that are priorities.
5. Look for ways to delegate. Not every task has to be done by you individually. Think about items you can pass to or share with others.

Human resources, space and facilities:

1. Ask for updated job descriptions from all administrative staff who report directly to you, and/or whom you are expected to evaluate. Find and review recent performance evaluations for each of those people,
2. Seek out the communication preferences of the person to whom you report. Does that person prefer information to come in writing or to hold in-person meetings on certain matters? Does he or she want full background briefings, or just crisp summaries? What is his or her preferred communication medium: email, paper, text, voice mail, or....?
3. Meet the administrative assistant of the person to whom you report. Introduce yourself in your new role and ask for opinions/advice of that person; invite that person to let you know if there's a more effective way to get something done. This person can be a helpful ally if you let him/her.
4. Tour all the facilities of your unit, including all classrooms, labs, offices, etc. As a faculty member, you might not be familiar with the full range of facilities assigned to your unit.