

MOVING ON

Creating a notebook for your successor

Sally Jennings
Presidential Spouse, University of Evansville

Ideas from sessions at the CIC Conference – January, 2006

Ideas on helping your successor

A group of President's spouses gave these suggestions for making a notebook to help your successor. Please feel free to add and or delete. No one knows your campus, community, and role as well as you.

PART ONE

General Thoughts for Your Successor:

- . Be yourself.
- . Have a sense of humor.
- . Take time for your family, your spouse, and yourself.
Schedule this on both the president's and spouse's calendars. If you have difficulty saying "NO", write the word *Something* on your calendar. Then you can always say, "I'm so sorry, but I have something on the calendar." This should be sacred time.
- . Be willing to say NO, or as Miss Manners says, "I'm so sorry, but that would be impossible." Explaining why is a mistake because they may come up with new possibilities.
- . Find something you like to do that is not connected to the college.
- . Smile and laugh: Then when you get some wrinkles, they will be happy ones.

PART TWO

Before the Move:

Ask for a video of the president's house. It will help you decide where your belongings should go. With colored stickers, assign a color to each room in the new house and make a sign with the sticker to tack up on move-in day. As boxes are being packed, place the appropriate sticker on each box.

Ask for a move-in inventory of college property. Make sure that another copy of this inventory is kept in a secure place elsewhere. It can be put on a DVD for storage. (Trust me – this will help when you move out.

Have an inventory of your belongings. A video of your stuff, taken in your current home, should settle questions as to possession when you move out. When people see an item, or items in the President's House, they often assume it belongs to the college. Having both a video and written inventory also helps if you have to file an insurance claim.

Read the handout from the moving company on general suggestions.

Pack a move-in kit. Include some dressy clothes.

If you are moving with children/child, ask if someone would try to get some names and phone numbers of parents with children the same ages. Ask if there are any summer programs for children, the age range, and who to contact. Presidential families usually move in the summer and this can be a good way to get your child/children involved.

PART THREE

Expectations of the Spouse

Most campuses do expect certain things of presidential spouses – someone once said, “If you think there are no expectations, imagine what would happen if you walked around campus wearing a bikini (females) or speedo (males).” I suppose you could switch to the other gender attire and get a stronger reaction.

Expectations vary wildly from campus to campus and from person to person. Each spouse should try to mold expectations around his/her personality and her/his situation. Some spouses work full-time, others don't. Some have responsibility for small children, teenagers, aging parents; some have none of those responsibilities. After saying all that, it still is helpful to have a clue about what has been done in the past.

List the jobs that a presidential spouse will inherit, or need to find someone else to do. Examples are event planning, managing of the house, planning and/or approving menus, traveling with the president, campus organizations that the spouse has traditionally been involved in or has held office because of the position.

If paid, is there a job description. If so, include it.

PART FOUR

Events

Make a calendar of those events that are traditionally held. (Your calendar may help, if not your food service may have kept records.) Include:

any information about these events that would be helpful,
when, where, who attends, attire (*See below), and who does the entertainment, if provided. Share if this is a tradition which is firmly rooted, or if it might be changed.

Event forms: There is no one form that will fit every college, but an example is included on the next page. To personalize this form, think of how you plan an event, from start to finish, and adapt the form accordingly.

Other traditions: (Not events) Examples given – Christmas ornaments given to faculty each year, Easter egg hunt for faculty/staff children, etc.

TRUSTEES:

1. Do you entertain trustee spouses? If so, either include the invitations, or make a list of the programs and entertainment provided. Tell how this is decided and what needs to be done.
2. Ask Institutional Advancement (Development) to take photos of trustees and their spouses, label them, and put them in an album. You can then add something interesting about each trustee and their spouse. Keep it short!
3. Note if any trustee has special needs – allergies (food-floral), handicapped accessible building, religious

prohibitions against any food, etc. Use your judgment as to whether you want to list any topics that should be avoided or any peculiar behavioral traits. This is often best done in a personal meeting.

4. If some meetings are held on campus and some held elsewhere, indicate which meeting is which.

5. Their meeting times should be on your calendar. If not, go back and add them.

MOST OF THE ABOVE WILL APPLY TO DONORS ALSO!

Scheduling: How do you and your spouse set up your calendars and keep them current and coordinated? Who has the power to put things on the calendar? Are you contacted about an event before it is scheduled? (This is a good idea, especially **EVENTS HELD AT YOUR HOUSE.**) It can be a good idea to have planning meetings with president, development director, secretary, and event planner, if campus has one.

*Attire – the terms formal, dressy, and casual vary wildly from one community to the next. It would be helpful to be a little more specific. The male spouses have it much easier determining no tie, tie, or tux.

Remember – “Having an event two years in a row makes it a tradition”

EVENT FORM-MAY HOUSE

Date: _____

Time: _____

For: _____

What: _____

Contact: _____

invited: _____

Alcohol: _____

What: _____

Who provides: _____

Menu: _____

Set-up: _____

Chairs _____

Tent: _____

Tables _____

Who orders: _____

RSVP#: _____

EVALUATION:

attended: _____

Any Changes for next time:

PART FIVE

Living in the Presidential Home

Suggest providing personal space. Keeping bedrooms off limits provides a family area. It can be nice to have a private place.

If there is a set budget for the house, give name of person who can best explain the budget and how to get funds for unusual expenses. Also give the name of the person who can get a voucher or check. (This may be the same person.)

Encourage the incoming spouse to set up a schedule for housekeeping and maintenance. Some spouses have a full-time housekeeper, while others just want occasional help.

Set a policy for the people who will come in your house. Some spouses wish to have notice and a knock before a person providing services comes in, others don't care. Decide which is more comfortable for you. Inform those who need to know.

Services provided for home:

Housekeeper – List name, phone number, day or days or work, list of duties, how she/he is paid.

Lawn care - List who is responsible and their phone number, what is included, (do they plant flowers, shovel snow, blow off patio and sidewalks.

Maintenance – Who is in charge and phone number, what are their responsibilities, and is there a maintenance plan for the house. When are the carpets and gutters cleaned, windows washed, air conditioner and furnace checked and cleaned.

Security - phone number and any services they provide.

Alarm – Code and instructions on use.

Who decorates the house for Christmas? Is it a tradition?

Add anything else you wished you had known about the house and the services provided for it.

Is insurance provided for house, contents and liability? Give the name and phone number of the insurance provider.

List any important historical objects and tell history.

“They may own your house, but they don’t own your home.”

From a presidential spouse

Living in Your Own House

List the services that are provided if you are expected to do college/university entertaining in your home?
Who carries the liability insurance for the house?
Where entertaining is done on campus? Who reserves the room and from whom?
Add anything you think might help.

PART SIX

Logistics

Phone list of campus contacts – perhaps listed by what they can do for example – arranging for tables & chairs for a picnic at your house, getting an extra housekeeper day, fixing the pipes when they burst, ceiling when it leaks, or the basement when it floods.

If there are campus people that it is important to know, you might list names and tell what they can do. Example: a benefits clerk who will make sure all possible insurance benefits have been received. NEVER leave any negative statements on paper.

PART SEVEN

Community

Leave a local map.

List name and phone numbers for doctor, dentist, hairdresser, florist, grocery, dry cleaner, library, public and private schools, etc.

If in own house, include plumbers, electrician, etc.

List various community organizations and a contact person. Getting involved can help one find fulfillment, not related to the campus.

This section is for the spouse who is leaving.

MOVING ON

Suggestions to make your move easier.

Using the college's inventory, put tags or stickers (one works on some things, the other on the rest). Make sure the stickers and the tags have the same color. It can be hard to find tie-on tags in colors, but you can always use a marker. Then when the moving people come, show them your system for identifying items NOT to be moved and remind them that they will have to return any of the college items if they move them.

For additional ideas, turn to PART TWO, *Before the Move*