

The Chief of Staff

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The Issue of Higher Education

The chief of staff and crisis response
A framework for parallel partnership
The chief of staff in US medical schools
Pathway to the presidency
Public-servant education in the Indo-Pacific

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Foreword

From emerging role to established function: a decade of growth in understanding the chief of staff role.



David C. Hood

Professor in the Doctor of Business Administration
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In 2017, the higher education chief of staff remained something of an organisational mystery. While the position had become increasingly common across colleges and universities, relatively little scholarly attention had been devoted to understanding the role, how it functioned within institutional structures, or why presidents were increasingly relying upon it. Early research focused primarily on describing the position itself, the responsibilities chiefs of staff assumed, and the ways they navigated the complexities of their institutions.

Reading the articles collected in this special issue nearly a decade later, I was struck by how much the conversation has evolved. The contributors gathered here are no longer attempting to answer the question of 'What is a chief of staff?', as I once did. Instead, they assume the role exists, contributes value, and occupies a meaningful place in higher education leadership. The discussion has shifted from explaining the position to examining how it functions and evolves in practice.

Contributors explore chiefs of staff as crisis leaders, institutional integrators, executive partners, governance navigators, strategic advisers, community builders, talent developers, and architects of organisational alignment. That progression alone reflects an important maturation of the field.

Perhaps most striking, however, is what emerges when these contributions are read together as a body of evidence. The articles address a remarkable variety of institutional contexts and challenges. Contributors discuss crisis preparedness, medical schools, presidential succession (Jack, p. 23), governance structures, provost offices (Miller, p. 73), dean-chief of staff partnerships (Johnson and Bishop, p. 67), and international public-sector leadership environments (Loh, p. 29). The higher education landscape

represented in these pages is substantially different from the one that existed a decade ago. Universities now face intensifying scrutiny, demographic pressures, technological disruption, changing workforce expectations, declining public trust, and increasingly complex operating environments (Farmer, p. 51). Yet despite these differences, the descriptions of the chief of staff role remain remarkably familiar.

Across the collection, contributors repeatedly describe chiefs of staff as connectors, translators, conveners, relationship managers, strategic advisers, information brokers, and trusted partners. They help leaders see across institutional silos. They facilitate communication between groups that possess different goals, responsibilities, and perspectives (Vultaggio, p. 14). They create alignment where complexity threatens fragmentation. They help institutions move from strategy to execution while simultaneously helping executives navigate demands that exceed the capacity of any single individual.

In these respects, the role appears less defined by changing circumstances than by an enduring purpose. While the challenges confronting higher education have changed substantially, the core function of the chief of staff appears strikingly stable.

This observation becomes even more interesting when viewed through the lens of scholarship that emerged between 2017 and the present. By 2023, research had already begun moving beyond role identification towards a deeper examination of how chiefs of staff function within institutions. Rather than defining the role, scholars increasingly sought to understand how it operated across different institutional contexts and leadership relationships.

Nicholas Everage's dissertation, '*"Oh, What Makes You So Special?" A Dual Exploration of the Chief of Staff in Higher Education*' (EdD diss., University of Georgia, 2023) represented an important step in that progression. Rather than simply asking what chiefs of staff do, Everage examined how presidents and chiefs of staff understood the position, how those perceptions differed, and how the role varied across institutional contexts.

Importantly, recent findings did not radically redefine the role. Instead, they expanded our understanding of it. The current research highlights chiefs of staff as trusted

advisers, institutional connectors, strategic partners, relationship managers, and individuals who often exercise influence through credibility rather than formal authority. It also reveals the complexity of the role's organisational positioning and the degree to which responsibilities vary across institutions (Navarro et al., p. 59).

The significance of Everage's and others' work is not that it overturns earlier understandings of the chief of staff. Rather, it collectively demonstrates that the conversation itself has matured. This special issue represents another step in that progression.

What is particularly interesting is that these authors often arrive at similar conclusions despite examining the role through very different lenses. Whether discussing governance, crisis response (Canady Wargo et al., p. 39), executive partnerships, institutional strategy, professional development, leadership succession, or organisational influence, contributors repeatedly emphasise the importance of relationships, credibility, judgement, and the ability to work effectively across institutional boundaries. The language varies from article to article, but the underlying message remains remarkably consistent.

At the centre of many of these descriptions is trust. Contributors repeatedly describe trust as the mechanism through which chiefs of staff gain access to information, exercise influence, facilitate collaboration, and help institutions make decisions amidst uncertainty. What becomes clear across these articles is that the effectiveness of the chief of staff rarely stems from formal authority. Instead, effectiveness emerges from credibility, judgement, discretion, relationships, and the ability to create confidence among diverse stakeholders. The chief of staff occupies a position that depends heavily upon influence but only minimally upon direct control (Burney, p. 80).

Several contributors describe this dynamic from different perspectives, yet they arrive at similar conclusions. Whether framed as institutional integration, parallel partnership, influence without authority, strategic translation, or community building, the underlying principle remains consistent: the role succeeds when people trust the individual occupying it.

Taken together, the scholarship and practice represented in this special issue suggest something noteworthy. The most significant change over the past decade

may not be the role itself. Rather, it may be the collective understanding of the role. While colleges and universities continue to differ in how they structure the position, a greater degree of conceptual clarity appears to be emerging regarding the value the role provides.

Looking forward, the role will undoubtedly continue evolving. New technologies will reshape decision-making. Governance challenges will emerge. Demographic, economic, and political pressures will continue transforming higher education. The questions confronting institutions 10 years from now will almost certainly differ from those explored in these pages. Yet after reading this collection, one conclusion seems likely to endure.

Colleges and universities will continue to need people who can connect disparate groups, translate across organisational boundaries, create alignment among competing priorities, and help leaders make sense of complexity. They will also continue to need individuals who transform information into understanding, relationships into action, and institutional aspirations into coordinated effort.

The environment has changed dramatically since 2017, when I completed *An Investigation into the Role of Chief of Staff in a Higher Education Setting* (PhD diss., University of Nebraska–Lincoln), and the conversation surrounding the chief of staff has evolved just as dramatically. What remains remarkably stable is the essential contribution of the role itself.

As long as higher education remains a complex enterprise, there will be a need for leaders who help institutions move together rather than merely move. This publication suggests that the chief of staff has become one of those leaders, not simply as an administrative support position, but as an established leadership function within higher education.

David C. Hood is a Professor in the Doctor of Business Administration (DBA) programme in the College of Hospitality and Business at Johnson & Wales University. Professor Hood holds a BS and MBA from Johnson & Wales University, an MEd from Rhode Island College, and a PhD in Leadership Studies from the University of Nebraska–Lincoln. He also serves as a reviewer for the Academy of Management.

Letter from the CEO

Few sectors ask as much of their leaders as higher education. Shared governance, distributed authority and a community that runs from students to legislators mean no decision belongs to one office alone, and the consequences reach well beyond campus.

It is in this setting that the chief of staff has moved from an emerging position to an established leadership function. This issue examines that shift through the words and examples of the people living it.

Our contributors write from the offices of presidents, provosts and deans, from US medical schools, and from a school of government working across the Indo-Pacific. They have led institutions through hurricanes and campus shootings, inaugurated new roles, and established a path from chief of staff to the presidency.

Their findings travel beyond higher education. Chiefs of staff and principals in every sector will recognise the trust, alignment, influence and partnership at work here. They will see it tested in one of the oldest kinds of institutions as it responds to new technology, climate crisis, and growing scrutiny from governments and the press.

Knowledge shared between peers is how a profession matures. It is the principle behind the Certified Chief of Staff® credential, our membership, and the State of the Industry survey, now open for 2027. It is also the foundation of the new research published in these pages.

My thanks go to Professor David C. Hood, whose early study helped open this field, for his foreword, and to the contributors for documenting the challenges and impact of the role within institutions and for the leaders they work alongside.

Sincerely,



The Chief of Staff Association



Trent Smyth AM
Chief Executive Officer

‘State of the Industry’ 2027

The *State of the Industry Report* is one of the Association’s most important publications.

Open to the public, it covers compensation, AI, career pathways, wellbeing, and the evolution of the profession. Respondents are grouped into three categories:

- Aspiring chiefs of staff
- Current chiefs of staff
- Principals

Take part now. Scan the QR code.

ALL respondents receive a personalised benchmark report and access to findings before publication.

CSA members join a lottery for one complimentary ticket to COS27 and non-members are delivered one free resource from the CSA resource bank.

Enquiries can be directed to Henry Martin, Editorial Manager at editor@csa.org.



20 questions

10 minutes

Drive the conversation

Notes:

- All responses are anonymised and aggregated for reporting.
- The survey includes GDPR-compliant data handling.
- The personalised benchmark report is delivered by email a week before publication.
- Publication is scheduled for February 2027.

Editor's introduction



Henry Martin
Editorial Manager
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Higher education institutions are complex organisations in which to lead, where academic governance, public accountability, student experience and significant commercial pressures bring daily challenges. The chief of staff role in this environment is distinctive and demanding.

Employing a range of methodologies, including surveys, interviews, case studies and focus groups, this issue examines what it means to serve, support and lead alongside HE stakeholders ranging from provosts to crisis response teams. In this setting, the chief of staff emerges, unambiguously, as a custodian of the institution's mission.

The coordinates of the role are examined from different institution types, within the office of the provost, as a pipeline into the presidency, in iterative role design, and from the vantage point of an Indo-Pacific school of government. As a result, as Professor David C. Hood writes in the foreword, and Julie Vultaggio argues in the first article, the role is no longer, as it once was, a mystery. Instead, the competencies, skills, relationships and challenges are clearly and generously articulated by the authors in a way that will benefit chiefs of staff in other sectors and principals in HE looking to inaugurate the position.

As the issue came together through successive rounds of edits, crisis response and servant leadership began to emerge as key themes. From my standpoint, Melissa Canady Wargo, Jess Boersma, Kim Santos Bradley and Bradley R. Ballou capture an essential truth when they observe that the value of the chief of staff becomes most visible when information is fragmented, stakes are high and the principal needs both situational awareness and protected capacity to lead. This is particularly true in times of crisis, when formal structures are strained. Their description will resonate with chiefs of staff operating in any sector.

It has taken five months to bring this issue together. I am grateful to my editorial board (Jessica De Pinto, Tyler Guenette, Sharon O'Kelly, Luis R. Visot and Julie Vultaggio) for their support, and to the authors for their patience, hard work and conversation throughout the process. I am proud of this special issue, and I see it as the start of a conversation rather than the last word. The voices here come mainly from North America, but the role is evolving just as quickly around the world, and not solely in higher education, but also in school systems, vocational, and further education environments. If you want to explore the challenges and opportunities of the role in your region or institution, please reach out. Together, we can build a fuller picture and learn from each other.

Defining the chief of staff role in higher education:

A framework for parallel partnership

Julie Vultaggio



Defining the chief of staff role in higher education

Julie Vultaggio

Built on three tenets—interstitial leadership, matched positioning, five workstreams—and original data from the first large-scale, cross-national study of the role, the parallel partnership framework offers chiefs of staff and principals a diagnostic tool and shared vocabulary for clarifying the position.

'People don't know what to do with us,' a chief of staff recently reflected during our interview about their 30-year career in higher education (HE). Having served multiple institutions with multiple presidents, they named one of the most common challenges with the role in colleges and universities: it seems mysterious.

The position has deep roots outside of academia, existing in the US military since the early 1900s,[1] and in the US government for seven decades.[2] Over the last 20 years, chiefs of staff have proliferated in corporate settings: the number of non-government chiefs of staff has doubled since 2007,[3] and the number in North America has more than tripled since 2021.[4] Sharing the title at a dinner party yields curiosity with excited whispers about how the job sounds impressive, important and stressful. Then there's the fast follow: 'So, what exactly do you do?'

The higher education landscape

While they certainly have their share of politics, colleges and universities are unique ecosystems in which to operate as a chief of staff. Our governance is shared and our stakeholders are unlike any other industry, ranging from adolescents to politicians to a group one interviewee summed up as 'parents calling'. The sector's demands are increasing: trust[5] and resources[6] are declining, hundreds of institutions are closing,[7] and there were 43 campus shootings in 2025.[8] Our leaders, meanwhile, trained mostly for tenure—not organisational management—are staying for shorter stints.[9] Amidst all this, the HE chief of staff provides critical stability to keep the institution going, acting as a capacity catalyst and an impact amplifier for high-priority work. So yes, dinner-party friends: the job is important and, at times, stressful. But it is not a mystery.

[1] National Archives, 'Records of the Army Staff (Record Group 319)', *National Archives*.
[2] Chinatsu Tsuji, 'White House Chief of Staff', *Encyclopedia Britannica*, 23 March 2026.
[3] Laurie Arron, *Who Has Your Back? A Leader's Guide to Getting the Support You Need from the Chief of Staff You Deserve* (Boulder: Modern Wisdom Press, 2023), p. 15.
[4] Matthew Boyle, 'The $400,000 Chief of Staff Is the CEO's Secret Weapon in the AI Age', *Bloomberg*, 16 July 2026.
[5] Yale University, *Report of the Yale Committee on Trust in Higher Education*, 10 April 2026.
[6] Page Forrest, Riley Judd, and Samuel Pittman, 'Higher Education's Uncertain Fiscal Future', *The Pew Charitable Trusts*, 12 November 2025.
[7] Marina Villeneuve, and Olivia Sanchez, 'Tracking College Closures', *The Hechinger Report*, 23 December 2024.
[8] The World Data, 'Campus Shootings in US 2025: Statistics & Facts', 16 December 2025.
[9] Danielle Melidona, Benjamin G. Cecil, Alexander Cassell, and Hollie M. Chessman, *The American College President: 2023 Edition* (Washington, DC: American Council on Education, 2023), p. 8.

In this article, I offer a conceptual framework for the HE chief of staff role grounded in three core tenets: interstitial leadership, matched positioning, and five workstreams. Informed by existing literature and original data from the first large-scale, cross-national research study of this population, the framework elucidates the position for those in, aspiring to, and supporting the role. It also offers a nomenclature as well as a diagnostic tool for role assessment and adjustment—all situated in the unique organisational context of colleges and universities.

The parallel partnership framework (PPF)

In a study of 116 chiefs of staff and related roles in higher education—a group I call second-seat leaders, serving as 'number two' to a president, chancellor, provost or dean[10]—78% reported some level of ambiguity in their job responsibilities.[11] This led me to wonder: how can we better articulate our role? Doing so not only creates clarity about job responsibilities but empowers chiefs of staff (and those with whom they collaborate) to delineate scope, purview and leadership capacity in collectively advancing institutional goals. Study findings paint a picture of the essential positioning and functions of the role in HE, anchored in ensuring success for principal and the institution. The framework begins with a concept I call interstitial leadership: leading in the space between.[12]

Concept 1: Interstitial leadership

Many chiefs of staff spend their days, as one interviewee described, 'managing in the middle.' They constantly toggle between tasks; craft a proposal for a degree launching in three years and respond to a curriculum question asked yesterday; shift from off-camera Zoom support to on-stage strategic plan discussions; formulate the Q4 board deck while sitting in the Q2 meeting; and adapt mindset from big picture to weeds, strategy to tactics, and blue sky to reality. The HE chief of staff clocks 10,000 steps a day sprinting between spaces, directing traffic as they go. This is interstitial leadership [see Figure 1].

Second-seat leaders have an intentionally broad purview, leading across units rather than within them. Unlike more functionally grounded CXO roles, the chief of staff continuously bridges people and information, 'making connections where they might not be obvious', as one interviewee described it. Others noted, 'It's our job to know everything going on' across departments and divisions—not simply to coordinate, but to inform and lead cross-functional work. This connective skill is a chief of staff trademark and the heart of interstitial leadership.

[10] Data collected for this study include 116 survey responses and 47 interviews with chiefs of staff and individuals in analogous roles representing diverse institutional types—community colleges, R1 universities, public and private institutions, undergraduate and graduate level—across seven countries. Data were collected between April 2026 and July 2026. Participants serve or have served presidents, chancellors, provosts and deans. Study limitations include potential selection bias (all participants voluntarily self-selected) and generalisability. While seven countries are represented, most respondents are from the United States. There is also an underrepresentation of certain institutional types, including community or technical colleges and liberal arts colleges.

[11] Percentage of question respondents who selected anything other than 'completely true' for 'I have a clear sense of my job responsibilities and how to be successful.'

[12] The concept of interstitial leadership draws on liminal theory, first introduced by Arnold van Gennep (1960/1988) and Victor Turner (1967, 1982). Since the original anthropological framing focused on rites of passage and the notion of being 'betwixt and between' fixed states (Turner, 1967, p. 97), several studies have expanded on the theory, applying liminality to organisations and specific roles such as teachers (Cook-Sather, 2006), consultants (Czarniawska and Mazza, 2003), and temporary workers (Garsten, 1999). While interstitial leadership differs from the ritualistic shifts between states described by van Gennep and Turner—primarily in terms of suggesting fluidity among leadership tasks and identities versus crossing a threshold into the next fixed point—there is certainly connection to liminal theory, particularly recent expansions that recognise less structured transitions and more frequent switching between work, spaces, and identifications.

Figure 1: Interstitial leadership



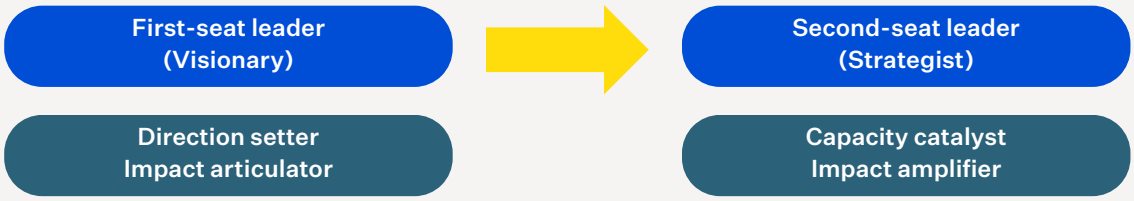
Concept 2: Matched positioning

While presidents, chancellors, provosts and deans define institutional direction and impact goals, participants identified a second-seat superpower: turning vision into reality. Explained by one interviewee, they 'actualise the thing [their principal] dreamt about.' Yet, for the power to be activated, chiefs of staff must be positioned appropriately. Not *below* the president, chancellor, provost or dean—*beside* them. This is the concept of matched positioning [see Figure 2].

On an organisation chart, second-seat leaders often appear beneath the first seat—which is logical in terms of reporting lines. But positioning matters: without a parallel structure (or something closer to it, recognising exact parallels may not be possible),[13] second-seat leaders can be conflated with assistants as opposed to true partners and 'extensions' of the first seat.

Note that second-seat *leader* is used intentionally: chiefs of staff collaborate with the first seat to establish priorities, align constituents with the vision, and motivate others to enact that vision. They do this while also organising, operationalising, monitoring and troubleshooting, distinguishing them from pure managers.[14] This is reflected in the 84% of respondents who indicated they are 'viewed as a leader on campus'.[15] Building on both points, the capacity catalyst designation is introduced in this segment of the framework, referring to the chief of staff's ability to anticipate the principal's needs, absorb work from their plate and solve problems before they materialise. In doing so, second-seat leaders create time for the president, chancellor, provost or dean to focus on high-level priorities—more than 30% of time, according to a 2026 report by the Chief of Staff Association and Deloitte—amplifying the impact of the principal and, ultimately, the institution.[16]

Figure 2: Matched positioning



[13] A literal parallel structure may not be feasible at some institutions, for reasons ranging from reporting lines to institutional culture and norms. When true matched positioning cannot be achieved, it may still be possible to signal the positioning of the second-seat role—e.g., outlining the strategic cross-functional lens, workstreams, and authority—thus offering a spectrum option for the matched positioning tenet.

[14] John P. Kotter, *Leading Change* (Boston: Harvard Business Review Press, 2012), pp. 28-29.

[15] Percentage of question respondents who mostly or completely agreed with the statement 'I am viewed as a leader on campus.'

[16] Deloitte and the Chief of Staff Association, *Inside the Symbiotic Partnership: The Chief of Staff and Their CEO* (Deloitte Consulting, 2026), p. 7.

Concept 3: The five workstreams

Returning to the question 'So what exactly do you do?', findings indicate that chiefs of staff in higher education advance five key workstreams in partnership with the first-seat leader. These workstreams are strategy, stakeholder engagement, communications, special projects and change—abbreviated in the framework as SC5 [see Figure 3].

Again, the second-seat leader is not solely responsible for these workstreams; presidents, chancellors, provosts and deans lead them as well, reinforcing the parallel nature of the partnership. The chief of staff may focus on different components in different proportions, though the workstreams are shared. Below is a brief description of each.

1. Strategy

Strategy tops the list intentionally. The phrase 'strategic partner' or 'strategic adviser' surfaced in numerous interviews. Survey data show that 'strategic planning or advancing institutional priorities' averaged 24% of respondents' time, and 84% of respondents reported playing an active role in shaping institutional strategy.[17] Yet 'strategy' can be amorphous, so it's important to understand what it means to second-seat leaders. In the Chief of Staff Association's Certification Programme, Ken Whitton posits that strategic work is big picture, acknowledges complex systems, draws on conceptual similarities, and embraces ambiguity.[18] Let's take an example.

One interviewee described their role in creating an AI policy strategy: researching across schools and sectors, gathering stakeholder input, understanding risks and benefits, proposing a recommendation and partnering with their principal on implementation. While the work may seem tactical, the thinking is strategic: big picture, understanding context and comparands, and applying creativity amid ambiguity. As expressed by one interviewee: 'Strategic thinking is required at every existential level of the college.'

Relatedly, John Kotter writes that strategy helps show 'how a vision can be accomplished,'[19] reinforcing the alliance of the first-seat visionary and second-seat strategist. Building on this concept, several interviewees have led strategic planning efforts with work ranging from convening stakeholders to authoring the plan itself, all focused on translating vision into reality. Described by one participant: the chief of staff is 'the strategic fire starter.'

2. Stakeholders

The second workstream ties closely to strategy and is reflected in the AI policy example: hearing others' voices. Survey

Figure 3: SC5, the five workstreams



[17] Percentage of question respondents who reported that 'I play an active role in shaping institutional strategy' feels mostly or completely true.
[18] The Chief of Staff Association certification programme, *How to Think Strategically* module, authored and delivered by Professor Ken Whitton.
[19] Kotter, p. 78.

respondents spent 24% of their time on stakeholder engagement with groups ranging from faculty to boards to alumni to direct reports. One interviewee noted, 'It's just a relationship business.' Another reflected, 'I'm half kidding [when I] say that at least 75% of my job is listening to people.' Social capital is a second-seat leader's most valuable asset. Colleagues often share concerns and ideas they are not ready to voice to the first seat: one participant described this as 'I'm really worried about this, but I don't want to tell him, can you tell him?' This establishes chiefs of staff as 'truth-tellers' and information brokers, given that those concerns and ideas fundamentally influence strategy, culture and decision-making. To the second element, 86% of survey respondents view themselves as a 'culture carrier' who influences how people experience leadership at their institution.[20]

> **'86% of survey respondents view themselves as a "culture carrier" who influences how people experience leadership at their institution.'**

Interviewees purposefully model the care, inclusivity and collegiality they hope to see across campus. For this stakeholder engagement and culture work, trust is paramount: 95% of respondents indicated that colleagues at their institution trust them.[21] When asked how trust is fostered, listening was the top skill cited alongside reliability: 'They know they can call me at 2.00 a.m. and … I'm going to do whatever I can to help.' Lastly, participants described representing their principal in stakeholder spaces as a core responsibility, underscoring the 'capacity catalyst' tenet. Powerfully stated by one chief of staff: 'I enable him to be in more rooms by being in more rooms for him.'

3. Communications

Building from stakeholder engagement, communications work comprises 18% of survey respondents' time. Beyond the day-to-day, second-seat leaders advise on message content, audience and sequencing. Multiple interviewees described leading the 'strategy behind' communications: who should receive the message, what they should know and how it might land. Chiefs of staff are often called upon to review communications for tone; as one interviewee shared, it's their job to 'know [the principal's] voice' and to discern how it gets used. Several interviewees communicate 'on behalf of' the first seat regularly, often to bolster progress: '[My principal] will forward me a thread and say hey, can you just chime in and keep it moving?'

The caveat with this workstream is that chiefs of staff do not simply draft communications, they carefully consider messaging within the institutional ecosystem. To this point, interviewees also connected communications work to other workstreams—describing it as 'integral to the culture, the strategy, how things are being heard'—and to impact amplification, noting the power of messaging to 'move the needle in terms of how people think about our institution.'

4. Special projects

Another 18% of survey respondents' time is spent on special projects, which interviewees underscored as prevalent and surfacing 'constantly'. Special projects are typically time-bound, time-sensitive and principal-assigned. Examples ranged from leading museum planning studies to executive searches; viewpoint diversity series to executive retreats; dashboard projects to litigation data collection. Like

[20] Percentage of question respondents who indicated that 'I see myself as a "culture carrier" who influences how people experience leadership at this institution' felt mostly or completely true.
[21] Percentage of question respondents who indicated that 'Colleagues at my institution trust me' felt mostly or completely true.

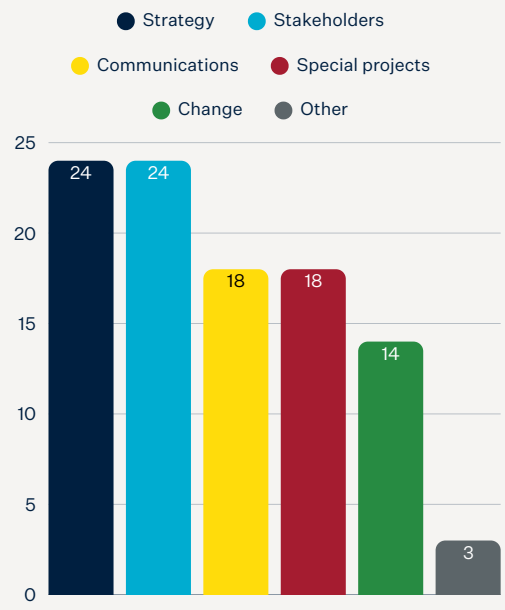
communications, special projects often represent a culmination of the prior workstreams with efforts spanning multiple units. This reinforces the cross-functional nature of the second seat; as one participant described, 'The common denominator between all of these projects is that they required bridging multiple areas inside the institution.' Participants distinguished the role in special projects as strategic—big picture, complex, creative—and as a method to create space for first-seat leaders, emphasising the capacity catalyst tenet. One interviewee explained, 'The dean needs this project done … and he doesn't have the capacity to take it on solo, so then I'll take it on his behalf.' Bridging the fourth and fifth workstreams, special projects can also arise from campus emergencies: 'Sometimes it's like, sorry, a building caught on fire, so … that is now your job.'

5. Change

The fifth workstream centres on change, both planned and unplanned. The most frequently cited planned change is first-seat retirements and resignations. In these scenarios, chiefs of staff lead or join search committees, propose interims, manage onboarding, and as one participant noted, navigate power 'jostling' among the cabinet. Though not necessarily emergencies, planned changes can consume significant time and resources, with second-seat leaders acting as stabilisers for the work and the community. In terms of unplanned change, survey respondents reported that crisis management comprises 14% of their time in an average month, with examples ranging from the COVID-19 pandemic to active shooters; fiscal receivership to disruptive protests; legal actions to loss of life. 50% of survey participants respond to campus emergencies daily or weekly. Some lead crisis management teams, convening stakeholders for briefings and action-planning while keeping the community 'calm and moving forward in an unsettling time.' Beyond the skill required to navigate change, it is important to note that this work can be emotionally stressful. One participant reflected, 'You've got all the stress the president has, but you don't have anything around you to help with it.' This speaks to the need for second-seat supports, which are difficult to find. 75% of respondents indicated feeling isolated or lonely;[22] as one interviewee explained, '99% of the stuff that goes on … you can't talk to anyone about.' Support is vital but deficient for second-seat leaders. Expanding opportunities for peer connection could mitigate burnout, enhance wellbeing and promote success in the role.

> **'50% of survey participants respond to campus emergencies daily or weekly.'**

Figure 4: Average monthly % time on workstreams[23]



[22] Percentage of question respondents who report their role 'sometimes', 'often', or 'always' feels isolated or lonely.
[23] Note that 'other' is primarily managing staff/the office along with managing the board, HR issues, operational leadership, and 'other duties.' This is not included in the five workstreams. Figures have been rounded up and down, achieving 101%. Exact results are 23.6% (Strategic Planning), 23.5% (Stakeholder Management), 14.1% (Crisis Management), 17.6% (Communications), 17.7% (Special Projects), 3.5% (Other).

From framework to practice

The parallel partnership framework offers an architecture for the chief of staff role in higher education [see Figure 5]. While largely a defining tool, it can also serve as a diagnostic for both second-seat leaders and their principals.

For current and aspiring chiefs of staff the framework can be used to evaluate:

- Positioning: Are you situated as a leader and extension of your principal with the ability to advance strategic work? If not, the matched positioning tenet could be a useful conversation starter.
- Interstitial: Are you spending too much time in 'blue sky' (big picture) or 'weeds' (details) mode? If so, talk to your principal about where to recalibrate.
- Workstreams: Are you seeing balance among your own workstreams—or are a few over- or under-emphasised? Revisit your job description and adjust as needed.
- Wellbeing: Are you able to thrive in the role? If you are feeling isolated or burned out, talk to your principal about support.

For first-seat leaders the framework can be used to assess:

- Role type: Do you need a strategic partner who enacts your vision across units or another type of position? The interstitial leadership tenet can guide your thinking.
- Responsibilities: Are you crafting a second-seat job description? The workstreams offer a starting point for core responsibilities.
- Entry: Are you welcoming a new chief of staff? Matched positioning provides a foundation for onboarding and framing for campus constituents.
- Partnership effectiveness: Is the partnership feeling strained or unproductive? Consider an earnest conversation about expectations and where additional support may be needed.

Figure 5: The parallel partnership framework



Let's return to the dinner party. Defining second-seat leadership in the parallel partnership framework allows higher education chiefs of staff to answer, 'So, what exactly do you do?' with confidence.

But the framework matters beyond this one conversation. If chiefs of staff serve as a stabilising force in a sector experiencing significant challenges, then the role can no longer remain open to interpretation.

Naming interstitial leadership, matched positioning and the five workstreams turns a mysterious job into a legible one that colleges and universities can define, support and rely on. This illuminates the second seat as an essential leadership role, depicting not only the workstreams but how higher education chiefs of staff must be situated for success.

'So, what exactly do you do?'

I am a strategist. A capacity catalyst.
An impact amplifier.

'I lead from the second seat.'

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The chief of staff pathway to university presidency

L. Hazel Jack



The chief of staff pathway to university presidency

L. Hazel Jack

The chief of staff position is the ideal executive apprenticeship for a presidency in higher education.

Many colleges and universities face growing organisational complexity, political scrutiny and rapid institutional change. This makes the search for a new president more difficult than ever. And yet, governing boards often overlook a contender with the experienced portfolio and relationships to step into the role. Often, they are sitting just a few doors down the hall from the board room.

In recent years, the chief of staff position has evolved from an administrative role into a strategic, cross-functional leadership seat. When managed well, it also allows for executive apprenticeship and a leadership talent pipeline for the university board.

Examples of chiefs of staff moving into presidential roles are not completely unheard of in higher education (HE). In a recent interview one informed me that he stepped into the interim president role just weeks after his principal left. After years of sitting next to the president in board meetings, cabinet meetings and budget reviews, his skill of exercising good judgement had earned him the trust of the board.

Although examples such as this exist, they are not yet common. In the US HE sector, the route to presidency still remains the traditional academic ladder: professor to department chair, dean to provost, academic vice-president to president. The same may be true of HE across the globe, where the chief of staff role is also expanding.[1] However, HE lags behind the corporate sphere where companies often design the chief of staff position as a time-limited rotation for leadership roles.

These organisations, which HE can learn from, recognise that sustained exposure supporting a senior executive can help build a leadership mindset.

> **'HE lags behind the corporate sphere where companies often design the chief of staff position as a time-limited rotation for leadership roles.'**

Cultivating leaders within your organisation's talent pipeline is not just a cultural nicety. Globally, university presidents only tend to serve three to five years, while the average presidential tenure in the US is currently at 5.9 years, falling from 8.5 in 2006, according to the American Council on Education.[2] Meanwhile, research on presidential search trends finds that leadership transitions outpace succession planning.[3] Each of these—increased turnover, shorter tenure, outpaced succession planning

[1] In 2026, I reviewed 113 HE institutions outside of the US based on the QS World University Rankings 2026 and added seven prominent African universities and two prominent Caribbean universities. I found that four in ten have a position titled chief of staff (or close regional equivalent) given that the position's title differs across languages.
[2] Danielle Melidona, Benjamin G. Cecil, Alexander Cassell and Hollie M. Chessman, *The American College President: 2023 Edition*. (Washington, DC: American Council on Education, 2023), p. 21.
[3] Lindauer, *Recruiting trends in higher education: Leadership transitions outpace succession planning* (2024).

and executive search costs—help make the case that HE boards should start considering the chief of staff seat as a key training ground for the presidency.

To argue this point, this article draws on interviews with four HE presidents who once served as chiefs of staff.[4]

The first argument is that, when positioned as an executive apprenticeship, the role develops a systems-level institutional understanding that traditional academic pathways do not provide.

The second is that naming the pathway through clear competency frameworks will expand the pool that institutions draw from for the next generation of leaders.

The third draws on the interviews directly: practical steps, suggested by the presidents themselves, that current chiefs of staff can action to move towards the presidency. 'An executive apprenticeship' and 'A competency framework' speak directly to HE governing boards, while 'What aspiring presidents can do' speaks more directly to current chiefs of staff interested in progressing into the role.

An executive apprenticeship

Historically, the chief of staff title clustered near the executive assistant end of the spectrum, focused on scheduling and logistics in the president's office. This may still be true at many institutions. At others, as the four presidents interviewed demonstrate, the role has been rebuilt, often around a specific president's needs. In these cases it looks closer to a chief operating officer with direct reports across functional divisions, a seat at board committee meetings and responsibility for coordinating work across the senior leadership team.

Each of the four presidents saw their roles as chiefs of staff as key training ground for the current position, specifying that broad cross-functional exposure to institutional decision-making, built over years, prepared them for the role.

'The chief of staff is the only administrative role with exposure to every functional area—labour relations, student conduct, housing, fundraising, communications, finance, and the board—that prepares someone for the presidency more thoroughly than the traditional provost track.'

President A compared the chief of staff to an 'offensive coordinator' who designs every play and knows every piece of personnel, while the president is the 'quarterback' who takes the hits. Chiefs of staff have the work of managing up and across the institution without the formal authority or support structure that comes with the top job.

President B described their chief of staff role as teaching 'the work of a college,' everything from vice-presidential portfolios to compliance to the practical limits on shared governance. For them, the only genuinely new territory after becoming a president was the legal terrain.

President C, whose portfolio as chief of staff included a major capital project, external affairs, and serving as a strategic sounding board, said that sitting in on every board and presidential meeting was the real transition preparation from chief of staff to president.

President D, who came to the seat from outside higher education, argued that the chief of staff is the only administrative role with exposure to every functional area—labour relations, student conduct, housing, fundraising, communications, finance, and the board—that prepares someone for the presidency more thoroughly than the traditional provost track.

[4]These semi-structured interviews took place by video call between June and August 2026 with presidents from four private US institutions.

A competency framework to address an overlooked pool

Search consultants and governing boards already know how to evaluate a provost or a chief financial officer as a presidential candidate. Those pathways to the presidency are familiar and well understood. A chief of staff résumé is harder to translate because their responsibilities cover so much ground and because the role can differ significantly across institutions and offices. This is a solvable evaluation problem, however, and not a reason to overlook this talent pool.

Unprompted, two of the four interviewees drew the same distinction: the presidency pipeline best suits a chief of staff who has experience fulfilling the duties of a chief operating officer, dealing with direct reports, board exposure and a portfolio spanning multiple divisions. It does not suit a chief of staff mostly tasked with scheduling and logistics. That the title can represent both ends of the spectrum is not helpful for boards hoping to understand where the overlap between a chief of staff and vice-president might be. To better understand this, the board needs to assess the chief of staff's résumé against a presidential competency framework. This will allow search consultants, governing boards and sitting presidents to evaluate the substance of the candidate, rather than the job title on the organisational chart.

Succession planning failures?

The gap between succession planning and practice appeared directly in the interviews. President D argued that succession planning is the board's fiduciary responsibility, yet most boards are not doing it. That gap shows up in the data too. A review of 2026 presidential biographies against 2022 data of 2,700 US institutions, identifies nine sitting presidents whose preceding role was chief of staff.[5] Meanwhile, a review of 113 non-US presidential biographies demonstrates that none had previously been a chief of staff despite the existence of the role at 43 institutions.[6] These two figures come from studies of different scales and regions and cannot fully correlate, but taken together, they point in a similar direction: that where the chief of staff role exists, institutions are not yet treating it as a route into the presidency. The opportunity here is to make that route something institutions build purposefully, rather than something that happens by accident.

What aspiring presidents can do

The first two takeaways are mostly aimed at institutions: name the pathway and build a framework to widen the search aperture. But the four presidents interviewed also offered a practical answer to the question that an ambitious chief of staff is likely asking: what can I do right now, without waiting for institutions to catch up?

President B suggested two practical habits: make sure the president explicitly communicates the chief of staff's authority to the cabinet, faculty and board, since the role often invites confusion. They also stressed the importance of staying visible on campus rather than working exclusively behind the scenes.

President A's framework for identifying pipeline-ready candidates—boundary spanners who sit on cross-campus committees and attend board committee meetings outside their own area—doubles as advice for those already in the seat: ask for responsibilities that aren't automatically part of the job description, rather than waiting for these to be assigned.

President D pointed to a major blind spot because he stayed out of academic decision-

[5] Hanna Rodriguez-Farrar and Laura Hazel Jack, 'Pathways to the presidency: An analysis of the gender gap at American four-year colleges and universities', in Barbara Cozza and Ceceilia Parnther (eds), *Voices from Women Leaders on Success in Higher Education* (New York: Routledge, 2022), pp. 15–30.

[6] Unpublished research undertaken by the author in 2026.

making as chief of staff. His advice, in effect, is to seek out the one area of the institution the role doesn't naturally touch and learn it anyway.

President C similarly emphasised using the chief of staff role to build breadth and gain exposure to the full range of presidential work. The most valuable preparation for her, in becoming president, was the access that her chief of staff role provided. This proximity not only allowed her to understand how decisions were made, but to observe how a president adjusted their leadership approach across different members of the senior team. Her experience suggests that aspiring presidents should assess their readiness not simply by their title or portfolio, but by being part of the institution's consequential work. In short, to learn the presidency from the inside, use your access deliberately.

Several stressed that the pathway depends on a relationship, not just a portfolio, and that trust must be built deliberately. President D described earning trust by being willing to disagree rather than simply deferring. He was equally clear that the fit doesn't always work: in an earlier chief of staff role, the executive he supported never extended real trust and the right move was to leave rather than wait it out.

President A described the opposite failure mode: he stayed deferential to the point of suppressing his own campus visibility so as not to appear to outshine the president. He named that as something he would do differently if given another chance.

President B was concrete about formal preparation: attend a dedicated executive leadership programme, shadow a sitting president—ideally at the kind of institution you want to lead—and talk directly to vice-presidents about how they experience the president's leadership.

The presidents interviewed here largely built their own case for the job, one deliberate choice at a time, well before anyone else was calling it a pipeline.

'A chief of staff position that is built with portfolio breadth, direct reports, and board exposure develops many of the competencies that the presidency requires.'

Conclusion

The case is straightforward. The talent is already there. It is time to start looking for it on purpose.

A chief of staff position that is built with portfolio breadth, direct reports, and board exposure develops many of the competencies that the presidency requires. Those competencies are specific, not abstract. Presidents can benefit from the experience of having already run a broad cross-divisional portfolio, and having held a meaningful role with the board, not just a seat at its meetings. Two of these four presidents did exactly that as chief of staff, including running the institution during a gap in presidential leadership before they held the title.

The presidency requires the expertise of institutional judgement and the ability to treat each decision as a trade-off before it lands. It necessitates building trust deliberately with a governing board or cabinet, rather than assuming trust through your position in the organisation. It also involves far less formal training than the title suggests. Only one of the four presidents pointed to a dedicated leadership programme as real preparation, while the rest pointed to years on the job.

And although the presidency carries no formal education requirement the way the provost track does, three of the four hold doctorates in different fields. This suggests that boards may be responding to the credential itself rather than to any specific discipline behind it.

None of these capabilities are exotic: they are what the presidency already requires, and for these four presidents, the chief of staff seat is where they cultivated them. These presidents describe a remarkably consistent apprenticeship, despite significant differences in how their roles were structured. As presidential tenures shorten and institutions face increasingly complex leadership demands, the match between what the chief of staff seat teaches—and what the presidency requires—matters.

None of this argues that every chief of staff is a future president. The claim is smaller: that a pool of tested, cross-functional leaders already exists within HE, and a small number are already becoming presidents.

Clarifying this pathway with a clear competency framework can meaningfully expand the pool from which the next generation of higher education presidents is drawn. But chiefs of staff should not wait for institutions to clarify this pathway: the presidents interviewed here built *their* candidacies one deliberate step at a time.

Six practical steps for the presidency

1. Improve visibility and authority
Work with your president to ensure your authority is clearly communicated to the cabinet, faculty and board, and prioritise being visible on campus rather than remaining behind the scenes.

2. Expand your portfolio
Proactively request responsibilities beyond your core duties, especially those that involve cross-campus committees or board meetings, to act as a 'boundary spanner'.

3. Identify and address blind spots
Deliberately seek experience in institutional areas your role doesn't naturally touch to gain a comprehensive understanding of the university.

4. Cultivate strategic relationships
Build trust by engaging in honest dialogue and being willing to constructively disagree with leadership, rather than simply deferring.

5. Pursue formal development
Invest in structured preparation, such as attending executive leadership programmes, shadowing a sitting president, and seeking new perspectives by talking directly to vice-presidents.

6. Assess fit
Evaluate your current environment. If the executive you support is unwilling to extend trust and opportunity, consider moving on rather than waiting for an opportunity that may not materialise.

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‘The leader an organisation needs’

an interview with Evelyn Loh



‘The leader an organisation needs’

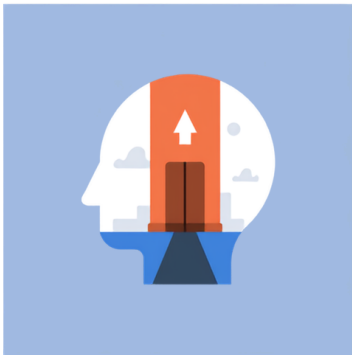
Evelyn Loh, interviewed by Henry Martin

Evelyn Loh is Chief of Staff and Company Secretary at the Australia and New Zealand School of Government (ANZSOG), holding governance responsibility to both Board Chair, Sharyn O’Neill AO PSM, and Dean and CEO, Professor Caron Beaton-Wells, who serves as the institution’s chief executive and academic leader.

Operating across the Indo-Pacific, ANZSOG is a not-for-profit institution that brings together 10 government and 15 university and business school members, building the capability of public servants through education and research.

Before joining ANZSOG, Evelyn served as Policy Manager at the Department of Foreign Affairs and Trade (DFAT), Director at the Department of Premier and Cabinet in Victoria, and in a multilateral director role at the Asia-Pacific Economic Cooperation (APEC).

In this interview with Henry Martin (Editorial Manager, Chief of Staff Association), Evelyn reflects on what it means to operate in a complex structure holding two lines of duty and the impact of that leadership in the public sphere.



Henry Martin: What are the two or three most pressing challenges facing public servants across the Indo-Pacific today? And how is ANZSOG's approach to training evolving in response to those challenges?

Evelyn Loh: Challenges facing public servants in the Indo-Pacific probably look similar to those for civil and public servants across the world, but with some local nuance.

Public servants are operating in a world that is simultaneously more connected and more fragmented. This is fundamentally changing what citizens expect from governments. Three examples come to mind.

First is the constantly changing geopolitical and social environment. For this region, the influence of China and India dominates. The regional relationships are multilayered, with significant diaspora communities impacting many domestic policy areas. These big regional actors shape not only foreign policy, but areas like education, migration, trade and tourism. Decisions made in other regions have ripple effects that impact well beyond direct neighbours, and it’s a challenge for public servants to stay across, and make sense of, these developments.

The second is social cohesion and public trust, in an environment shaped by misinformation and disinformation—and growing divergence around sources of authority.

Public servants are increasingly developing policy and delivering services in environments where citizens are engaging in public debate with more access to information

than ever before. But is the information reliable? Are community members hearing and reading the same things, and so working from a shared understanding?

The third is technology. Particularly AI and its potential to transform service delivery, policy and regulation, and governing institutions and systems. This raises important questions about the role of people in administration and how decisions are made ethically and in a way that builds public trust.

All these issues relate to citizen expectations of government. People in this region—much like other places I suspect—are looking to governments to protect their security, facilitate prosperity, deliver improvements in living standards, and be accountable, and all at the same time as resources and workforce capability are under pressure. This demand to do more, often with less, is a significant leadership challenge.

ANZSOG's response is that these challenges cannot be addressed through technical responses alone. It requires leadership that can make long-term change to behaviour and culture. We are evolving from an education provider focused on the most senior levels of the public service to being a career-long development partner. We want to help leaders develop from early on in their career, building the judgement, relationships and skills to operate in complex and resource-light environments. This requires a combination of skills and leadership development in budget, project and people management, system leadership, the political-administrative interface, practical diplomacy, and ethics.

We are also investing in online learning that offers an equivalent experience to being face-to-face. This seeks to build accessibility and recognise the pressures of time and costs in travel. This is a real issue when we serve public servants from Wellington in Aotearoa New Zealand to Perth in Western

'This demand to do more, often with less, is a significant leadership challenge.'

Australia, 5,269 km apart: about the same distance from London to Boston.

In the end, the mission is to support public servants to deliver governance that people trust. Their challenge is to do this in a world that is changing fast, where demands are higher, where alliances are constantly morphing, and where trust is hard to earn and very easy to lose.

HM: What can you tell our readers about moving from government into a role with education in its mission?

EL: In many ways the environments are very similar: big institutions, lots of rules and conventions, multiple interests and agendas, and many fronts where reputational risk is high. So, while I didn't know how higher education worked in the same way as I understood the public or civil service, I was familiar with being in a big machine that had very firm—but often assumed—ways of working.

For chiefs of staff thinking about moving between sectors, I think it is useful to think about institutional similarities, and how skills translate from one place to another. One of the big adjustments for me was understanding how academics (faculty, researchers, professors, staff) work: what are their incentives and what is important to them? Academics are not a homogenous group—there's a huge variety of styles and preferences—but I learnt that, for most academics, work is simultaneously very independent and very networked with whoever they are researching or teaching with. Their sense of team is flexible depending on what they are working on. This is great in terms of the opportunity to

join their team. They are also keen to work with practitioners and to see their research have a life beyond papers and presentations.

However, I have found that there is often a gap between research and application: research takes longer than practitioners want, and there are always significant caveats on how it can be applied.

A big 'aha' moment for me was when one of Australia's leading public administration scholars said to me that 'research is a conversation with all the researchers that have gone before.' It put research into context for me, helping me realise that practitioners are often looking for answers, while researchers are often working to improve the quality of the question. Both perspectives are valuable, and good public policy needs both.

As Chief of Staff at ANZSOG—which occupies a middle space between government and universities—I get to translate between these two worlds: one asking about what the best course of action is right now, and the other focused on what can be said with confidence at any time.

Serving my principal and the organisation well means setting out respective priorities and constraints, and finding where there is common ground to start working from.

> **'Serving my principal and the organisation well means setting out respective priorities and constraints, and finding where there is common ground to start working from.'**

HM: What did you carry across from your governance background into the new role?

EL: There's so much from a government and governance background that helps me, beyond simply understanding our customer profile of public servants. Government taught me how to navigate complexity without having control. I think the top three elements that have helped me are:

Anticipation: Government teaches you to think several steps ahead. I was always thinking about what the minister, my secretary, or other stakeholders, might want. Over time, knowing what people needed in advance—evidence, briefing, examples, implementation plans—became second nature. The instinct and initiative to anticipate what your principal will want is valuable in preparing them for meetings, decisions and events. Anticipation saves time, and it can really help a chief of staff and their principal stay ahead of the curve, rather than just react to circumstances.

Judgement: Government builds strategic nous. You learn to recognise what's going to be an issue, what will be sensitive, what's an underestimated risk, and what the consequences of decisions—big and small—are likely to be. A lot of judgement relies on knowing, as a baseline, your governance frameworks, standards, regulations and authority to act. These are fixed and form the boundaries for analysing situations. It also comes from experience, and what you learn from getting things wrong and making mistakes. Good judgement is rarely about avoiding risk. It's more about understanding which risks are material, which can be managed, and which need to be escalated to the principal to avoid unwanted surprises.

Practical problem solving: In government, I was often responsible for coordinating outcomes without formal authority. Achieving results relied on relationships, credibility and persuasion rather than hierarchy. I became a great problem solver across teams: thinking laterally about how to get people to cooperate, meet deadlines, provide information and resources, and remove roadblocks. These are core chief of staff skills. Being called a 'safe pair of hands' was one of the best compliments you could receive, reflecting trust and competence.

HM: After nearly 18 months as company secretary and principal adviser

your role changed to chief of staff and company secretary. What did this change entail?

EL: There were two significant changes when my role evolved. The first was an expansion in scope. As principal adviser, I was already leading a lot of work on organisational culture, internal communications and business planning, but this really took it up a level. As chief of staff, I was given responsibility and authority for strategic projects from the Dean and CEO's office. This included a new strategy for senior institutional member engagement, and aspects of school-wide change management.

It also coincided with developing a new strategy with the board; so, a lot of work around defining our purpose, mission and value proposition—as well as understanding our market and our commercial prospects. As chief of staff, I became much more active in designing how this strategic work would take place, how we would consult with staff and stakeholders, and how different views could be brought together.

This was a great opportunity to learn and develop my skills in project planning and execution, stakeholder engagement, data analysis and change management.

The second change was that I formally joined the school executive team. I had attended executive meetings as the secretariat, and I was often invited to contribute views, but I didn't have a role in decision-making. Joining the executive gave me greater authority and influence. I had a platform to surface issues and provide advice with a whole-of-school perspective. It required a change in mindset: I wasn't just there to support and represent my principal but also to contribute to the collective leadership of the school.

This second change was probably the more significant transition: moving from being an adviser to the executive, to becoming an active member and exercising leadership from that vantage point.

HM: You were responsible for onboarding your principal into her role as CEO. What did that involve and could you offer any advice to another chief of staff in a similar situation?

EL: Onboarding a CEO is a big task. Everyone is watching to see how the transition goes, expectations are high, and there can be some staff anxiety to be managed, too.

There was a lot of preparation getting briefing material together in advance of our new Dean and CEO, Professor Caron Beaton-Wells, starting: including planning handover with the acting CEO, setting up stakeholder meetings, lining up internal and external comms, and ensuring she had a really good picture of what she was coming into. It was a real team effort to coordinate between the board chair, chief operating officer, executive assistant, and the others across the school.

One of my biggest priorities was preparation for how we would introduce her to staff, faculty and other stakeholders.

Obviously, there was a lot riding on first impressions, and the first few months were important for building trust and goodwill early. Onboarding wasn't just about helping my principal understand the organisation but also helping the organisation understand her.



Interestingly, she inherited both me and her new executive assistant: she didn't know us and we didn't know her. There was a lot of 'getting to understand' each other, including understanding her preferences and adjusting what we needed to do to support her. As an example, she told us that she liked to read as

a way of absorbing information and she liked having more, rather than less, background and contextual briefing. We discovered that she could absorb huge amounts of information and was very fast processing this (she is a former barrister) so we ensured we delivered this to support the way she worked best.

My advice would be to really invest in understanding your principal's operating approach. Every leader has a different way of working, thinking and presenting. The faster you can understand these preferences, the faster you can become an effective support.

We were lucky that our Dean and CEO was very aware of her leadership style and habits: she was able to articulate what did and didn't work for her. Not every leader has this level of self-awareness. As a chief of staff, you need to be observant and willing to identify and amend what is and isn't working for your principal. If you have a principal who is self-aware and they open up to you about what's effective for them, then you have an advantage. Similarly, if you understand your own preferences and ways of working, you can explain these to your principal and see where your respective strengths can support each other.

HM: How did you build trust in the early days? Was there a moment where you had to openly adjust how you were working together?

EL: Our trust was built through a few channels: primarily building professional credibility through accuracy, clarity and consistency between my words and actions. But it was also built by getting to know one another as people.

Early on, we spent a lot of time talking through backgrounds, interests, values and motivations. This included understanding our families, and factors outside of work that make us tick. I also developed an understanding of what gave her comfort and confidence at work, including who needed to sign things off, and who was delegated to make what decisions and why. This procedural assurance provided a good basis for trickier decisions.

Specifically, this happened through asking who she expected to be involved in decisions, suggesting a process to gather the information and perspectives we needed, and noting when she asked who had worked on a task. That last habit was especially useful for indicating whose advice and judgement she really trusted.

Similarly, noting who is cc'd to emails is a great strategy to understand consultation dynamics: not just for my principal, but generally. Who do people want to bring into the loop on what issues, and when?

> **'Every leader has a different way of working, thinking and presenting. The faster you can understand these preferences, the faster you can become an effective support.'**

We had a testing moment early on when she questioned my advice and why I had provided different advice to our board chair on the same issue. I explained that, as company secretary, my primary governance responsibility is to the chair and board. Sometimes the best advice for one stakeholder might not be the same for another, even when the situation is the same.

This was a test of our relationship. Could she trust me to advise and work in her best interests? She didn't know me, and I didn't have credits in the trust bank, so it could have gone badly. My approach was simply to stay consistent: give honest advice, be accurate, be clear and be responsive. I wanted to establish a pattern of good, reliable advice that created confidence, but I also needed to serve two leaders across my two roles.

I was also clear with her that if we didn't bond and the relationship wasn't working for

her, she needed to say so. Rapport is important and if it's not there, I'm not sure a CoS-principal relationship can work.

Something for chiefs of staff to keep in mind is that building trust is rarely a one-off event. You can lose trust in a single gesture, but it's built through hundreds of interactions where you demonstrate consistency, reliability and dependability, especially when you must convey unwanted news.



HM: ANZSOG answers to a board, a CEO, 15 university members, and 10 member governments. How does the idea of the CoS-principal relationship hold up in a structure with that many stakeholders?

EL: ANZSOG does have a complex governance structure, and if you were setting up an institution today it's unlikely you'd get this structure off the ground. But I think the reality is that most large organisations, like universities, answer to multiple stakeholders, and if you are chief of staff to the CEO, you'll be dealing with staff, members, owners, clients, suppliers etc. My experience is that the challenge is not managing the multitude of principals or stakeholders, it's maintaining clarity for oneself about which hat you're wearing at any one time. As company secretary, I advise and support the board through the chair. As chief of staff, I support and protect the Dean and CEO. I've learnt that I need to be super clear—both to myself and to my principal—when my advice is going to differ. Being transparent is not always comfortable, but thankfully the instances where I need to do it are rare. The board, chair and CEO are closely aligned on strategy and clear around the relative roles of the board and management. This makes a huge difference. It would be a lot harder if the board and CEO didn't work well together.

HM: What does governance fluency demand at this scale, compared with a single-institution setting, and how do you ensure a priority, such as your 2030 strategy, lands consistently across the stakeholder groups?

EL: Each time I think about ANZSOG sitting at the intersection of 10 governments and 15 institutions, across two countries, I am reminded that it really is an ambitious structure. With this many stakeholders, I think about governance fluency partly through formal governance structures, but perhaps more through understanding how different institutions make decisions, what they value, and what drives their behaviour.

Governments and universities often approach the same issue in different ways. Public servants are often driven by implementation and time imperatives, while academics are more focused on evidence and contestability. Neither is wrong, but they are different and sometimes they don't sit neatly together. Governance fluency means being able to work across both worlds: understanding their incentives, constraints and common ground.

In this environment, I've learnt that success relies on knowing which elements are fixed, which can flex, and why. Purpose and destination are fixed: both where you are going and what you want to achieve. But the way to get there can vary. In a multi-institutional or multilateral environment, you have to be open to different processes and approaches.

I learnt this when working at APEC, a multilateral organisation that worked by consensus with 21 members from across the Asia Pacific. Each member had their own agenda, domestic interests, and ways of doing things, which can be a bit baffling to an outsider. I came to appreciate

that there are many roads to Rome, but if different institutions share a commitment to a purpose, they can find their own path to get there. This way, implementation can reflect local priorities, cultures and sensitivities. If you are overly pedantic and rigid, it's easy to get stuck and fail, even with the best intentions in the world. In my practice as a chief of staff, this has helped me stay focused on building strategic alignment, rather than being in control. I've had to think about what is a must, and what is optional, because there is more effort that goes into making trade-off decisions than most of us realise.

HM: The 2030 strategy embeds First Nations and Māori perspectives into ANZSOG's approach to governance. What has that meant in practice for how the organisation defines good governance itself?

EL: This is a big question, and one that we are still working through. ANZSOG has long prided itself on being an advocate for Māori and First Nations peoples. We've sought to raise the profile of First Nations and Māori knowledge, issues and perspectives in public administration, to improve outcomes and deliver public value for communities. We've done this through conferences, case studies, professional development opportunities, and raising the profile of First Nations and Māori public administration through academics and public administrators over the past 10 years. It's a history we want to build on.

In developing our 2030 strategy and our 'Commitment to Change', our thinking about governance has evolved. It's relatively easy to think about First Nations and Māori governance in terms of representation within governance and advisory committees, faculty, staff, students and learners. But while representation is important, it's not the full picture.

A recurring theme for me has been the distinction between representation, participation and power. Good governance in this area isn't just about creating opportunities for First Nations and Māori people to be part of decision-making. It's also about considering who shapes the agenda, whose knowledge is valued, and how decision-making power is shared.

This has really changed how I define good governance. Traditionally, I'd have focused on visible things like structures, accountabilities, risks, delegations and processes. These are still important. But now I'm considering: Who has influence? Who is shaping the agenda? Who is absent? How are resources—like budget, information and time—being allocated and applied?

As a school, this means we've started thinking more about how governance structures facilitate genuine partnership, power sharing, and co-design. It has pushed us to think about the cultural capabilities of staff, so that engagement with First Nations and Māori perspectives is a regular part of how we work as a school.

As an education institution, it also means looking at how First Nations and Māori knowledge and perspectives are included in our curriculum, andragogy, learner experience and learner evaluation.

Perhaps the biggest governance lesson for us has been in recognising that ANZSOG is not a First Nations or Māori organisation, and what this really means for how we operate. Our role is not to speak on behalf of First Nations or Māori people. We can be an ally—we can work in support of First Nations and Māori academics, students and public servants—but we need to learn how to do

'Good governance in this area isn't just about creating opportunities for First Nations and Māori people to be part of decision making. It's also about considering who shapes the agenda, whose knowledge is valued, and how decision-making power is shared.'

this in a way that puts power in their hands.

I won't shy away from saying that these institutional culture and leadership questions are uncomfortable. They require us to test the assumptions that sit behind the governance structures many of us know and are familiar with. We are used to staying in control, even when we consult or seek input. But are we prepared to think differently around authority in relation to First Nations and Māori matters? Whose authority really matters, and do those most impacted by decisions have genuine influence over them?

HM: What does success look like for you in this role, and how has that definition changed since you started?

EL: When I started, I thought about success in quite a narrow way. I was focused on doing a good job for my principal and for the board. If the board had what they needed to set a strategic direction and exercise oversight, and if the Dean and CEO was supported to make informed decisions and lead the school effectively, then I helped the school be in a better place than when I started.

I still think this form of success is important, but with more time as a chief of staff, my definition has grown.

Institutionally, success now looks like alignment between strategy, performance and people. ANZSOG is a place where people want to learn, work and partner together. Staff know where they are going and how their work contributes to school performance and reputation. There is trust and challenge in the executive team, so decisions are robust and there is space to take risks and innovate.

And in the bigger, grander scheme of things, success is being recognised and valued as an influential advocate for, and contributor to, effective, ethical and efficient public service and public governance. Public institutions are critical to our security and wellbeing. If ANZSOG can support leaders in the region to govern well for this generation and the next, that's success.



HM: What keeps you motivated during the challenging moments?

EL: I really believe that public institutions matter. They can be the difference between a life that is fulfilling and enriching, and a life that is unstable, discriminatory and disempowering, so they should perform at their best to deliver value for the communities they serve.

My belief that institutions matter started long before my career in government. I grew up in Darwin—a small town at the very top of Australia—as the child of migrants. My parents worked hard, paid their taxes, took part in the community, and were grateful for living in a place where things just, well, worked. We benefited enormously from things many people take for granted: public education, hospitals, infrastructure and community services. Government wasn't at arm's length: it was a core part of what helped ordinary families, like mine, build a stable and happy life.

At the same time, growing up there, I saw that not everyone experienced government in the same way. Darwin has a high First Nations population, and many of their interactions with government were radically different, and much more negative, than my own.

Later, through my university student union, refugee and migrant community work, and Australia's overseas aid programme, I kept seeing the same thing: the difference

capable, ethical, and empathetic institutions can make to people's life prospects and outcomes.

Ultimately, I think most people play their part, contribute to their communities, and ask for relatively little in return. They deserve public institutions that are fair, effective, trustworthy and deliver value for money. That's a thread that has run through my whole career, and that I hope stays core to what I do. I'm motivated by the idea that my work helps institutions deliver good outcomes for society, in good times and especially in hard times.

As a chief of staff, I don't deliver services directly, but I can help create the conditions for others to do their best work. Because I can see the whole system, I have leverage and can help leaders make better decisions, support teams to work more effectively together, remove roadblocks, and facilitate decision-making so the organisation stays focused. That's work I find rewarding.

HM: What do you wish you could tell your younger self?

EL: Say 'yes!' to the opportunity. There have been so many times when I've volunteered or applied for something that I knew would be a challenge. My career hasn't been a straight line and there have been some rough patches. But by always looking for what I can contribute and what I can learn, I've not only become a better colleague and a better leader, but I think a better human. And learn sooner that 'being right' is less important than 'being effective.' I spent a lot of energy trying to be right and the one with all the answers. That stubbornness is exhausting, and it is way more fun to build a community and bring people along with you for the adventure.

Sometimes you can be isolated as a chief of staff: few see what we see, or have access to the information and insights that we have. Finding a network—like the Chief of Staff Association—that can help you work stuff out, that understands your problem, but doesn't know your people, is a real boon.

HM: In your eyes, what does good leadership look like?

EL: For me, good leadership is a combination of character and judgement: you have to know what you stand for and why that's important.

The leaders I've looked up to the most show a combination of principle, curiosity and empathy. Part of how they build trust is through their ability to be decisive. They recognise that leadership inherently involves making decisions without all the information they might want, and they do this guided by a strong sense of purpose and a willingness to be accountable for the consequences of their decisions. Great leaders provide steadiness and perspective when things are uncertain, and create environments where people do their best.

As a chief of staff, I've seen up close that being the leader can be lonely. Part of the role is to provide a safe space for my principal to be human: express frustration, be vulnerable, feel torn over difficult decisions. My job isn't to make the decision for them, but to help them work through options and issues, so they can lead with clarity and purpose. It's a real privilege to be trusted in that way—so someone can be the leader an organisation needs.

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Navigating institutional crises:

Practitioner insights for higher education leaders

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Introduction

Institutions of higher education are increasingly confronted with complex, high-impact crises, including natural disasters and mass casualty events that disrupt campus operations, threaten community safety, and require sustained recovery efforts. For an international readership, it is important to situate these crises within the distinctive US higher education context. American colleges and universities operate in a landscape shaped by the escalating frequency and cost of severe weather events, and a prevalence of gun violence and active-shooter threats.[1]

Within this environment, the role of the chief of staff has emerged as a critical, yet under-examined, function in institutional crisis leadership. Serving as a strategic adviser, integrator and coordinator, the chief of staff helps align executive decision-making with institutional action when coordination and communication are paramount.

This article examines the experiences of four chiefs of staff within the University of North Carolina System who led through major crises, ranging from catastrophic hurricanes to campus shootings.[2] Although the incidents differed considerably, the interviews revealed striking similarities in how chiefs of staff supported their principals and executive leadership teams.

Across all four cases, when normal systems came under stress, they functioned as a force multiplier, focused on the integration of people, information, decisions and institutional priorities.

This article offers practical insight for chiefs of staff, principals and higher education leaders who may be called upon to navigate institutional crises. Its central contribution is to make visible the integrative work that enables executive leadership during disruptions.

[1] For US climate and weather context, NOAA's National Centers for Environmental Information reports that North Carolina experienced 121 billion-dollar weather and climate disaster events from 1980 through 2024, with the annual average rising from 2.7 events across the full period to 7.4 events during 2020–2024. Recent hurricane impacts are especially salient: the North Carolina State Climate Office identifies Hurricane Helene as the state's deadliest and costliest known storm, with 108 fatalities, and lists Hurricane Florence in 2018 and Hurricane Matthew in 2016 among the state's 10 deadliest known tropical storms. The North Carolina Office of State Budget and Management estimated Hurricane Helene's statewide damage and recovery needs at $59.6 billion, including significant impacts to housing, utilities, transportation, agriculture, education, healthcare and local economies. For US mass-casualty and campus-violence context, the FBI reported 223 active-shooter incidents nationally from 2020 through 2024, a 70% increase over 2015 through 2019. The National Center for Education Statistics reports that from 2000 through 2022, active-shooter incidents at postsecondary institutions produced 157 casualties, including 75 deaths and 82 wounded. The Violence Project's Higher Education Homicides Database reports 280 homicide incidents and 370 lives lost at US colleges and universities from 2000 through 2025.

[2] The University of North Carolina System is North Carolina's statewide public higher education system, comprising 16 constituent universities that collectively serve more than 250,000 students. Its institutions include research universities, regional comprehensive universities, Historically Black Colleges and Universities, and a Native American-Serving Nontribal Institution, reflecting the varied institutional missions and communities served by public higher education in the state.

Methodology and literature review

Although higher education scholarship increasingly focuses on institutional responses to crises, the empirical literature does not address the *specific* role of the chief of staff during emergency events.

For higher education leaders generally, Ovie (2022) identified effective communication, collaborative leadership, adaptability and stakeholder engagement as critical elements of crisis management.[3] Gigliotti (2020 and 2022), meanwhile, observed that crisis leadership in higher education requires leaders to uphold institutional values, communicate effectively with diverse stakeholders, and make strategic decisions amid uncertainty and disruption.[4] He emphasises that the unique characteristics of colleges and universities—shared governance, decentralised decision making and competing stakeholder interests—make crisis leadership a complex but essential competency for higher education leaders.

Jacobs (2020) identified three dominant chief of staff functions on college campuses: liaison, delegate, and adviser, emphasising the role's importance as an institutional connector, but she does not address the role in crisis leadership specifically.[5] Similarly, Hood (2017)[6] and Everage (2023)[7] generally concluded that chiefs of staff frequently serve as integrators who bridge strategy, governance, communication and executive leadership, often adapting their responsibilities to institutional needs and presidential expectations. While empirical research on the specific role of chiefs of staff in crisis situations is lacking, practitioner literature offers relevant and related insights.

An Academic Impressions report (2020) argues that crises amplify many of the responsibilities inherent in the chief of staff role, including coordination, communication and executive support.[8] Likewise, The Voltage Control (2024) characterises the chief of staff as a facilitator of institutional alignment, organisational effectiveness and cross-functional collaboration during periods of uncertainty.[9]

Collectively, this literature points towards a common theme: chiefs of staff operate as institutional integrators capable of aligning priorities across organisational units. This study extends that understanding by examining how chiefs of staff function specifically before, during and after major institutional crises.

Methodologically, the study employed semi-structured interviews, anonymised for confidentiality. Each chief of staff reported directly to the university CEO equivalent and occupied highly strategic roles consistent with Ciampa's (2020)[10] and Fussell's (2017)[11] frameworks for senior-level chiefs of staff. Interviews explored participants' experiences across crisis preparation, response and recovery.

[3] Glory Ovie, 'Crisis Response in Higher Education: Insights from Educational Leaders', *Journal of Educational Thought*, vol. 55, no. 1, 2022, pp. 43–68.
[4] Ralph A. Gigliotti, 'Crisis Leadership in Higher Education: Historical Overview, Organizational Considerations, and Implications', *Oxford Research Encyclopedia of Education*, 24 February 2022; Gigliotti, Ralph A., *Crisis Leadership in Higher Education: Theory and Practice* (Ithaca, NY: Rutgers University Press, 2020).
[5] Laura Jacobs, 'Liaison, Delegates, and Advisors: An Examination of the Chief of Staff Role on College Campuses', *Journal of Research on the College President*, Fall 2020.
[6] David C. Hood, '*An Investigation into the Role of Chief of Staff in a Higher Education Setting*', PhD diss., University of Nebraska–Lincoln, 2017, University of Nebraska Digital Commons.
[7] Everage Nicholas, '*"Oh, What Makes You So Special?" A Dual Exploration of the Chief of Staff in Higher Education*', EdD diss., University of Georgia, 2023.
[8] 'When the Chief of Staff Needs to Handle a Crisis', *Academic Impressions*, February 2020.
[9] 'The Chief of Staff in Higher Education: A Vital Role for Visionary Leaders', *Voltage Control*, December 2024.
[10] Dan Ciampa, 'The Case for a Chief of Staff', *Harvard Business Review*, May–June 2020.
[11] Chris Fussell, *One Mission: How Leaders Build a Team of Teams* (New York: Penguin Random House, 2017).
[12] Kien Nguyen-Trung and Ngoc Lan Nguyen, 'Narrative-Integrated Thematic Analysis (NITA): How Can LLMs Support Theme Generation without Coding?' *Qualitative Research in Psychology*, March 6, 2026; Kien Nguyen-Trung and Susanne Friese, 'Towards a Methodologically Congruent Framework for GenAI Use in Nonpositivist Qualitative Research', *International Journal of Social Research Methodology*, July 21, 2026.

Transcripts were analysed using Narrative-Integrated Thematic Analysis (NITA), with final interpretation and validation conducted by the researchers and participants as recommended in emerging guidance on this type of qualitative research (Nguyen-Trung and Nguyen 2026; Nguyen-Trung and Friese 2026).[12] The analysis identified common responsibilities, leadership competencies, structural challenges and emerging practices.

For analytic clarity, we distinguish between three phases of crisis leadership: emergency response, sustained crisis, and recovery. Emergency response refers to the immediate period focused on life safety, stabilisation, communication and rapid coordination. Sustained crisis refers to the period after initial stabilisation when institutions continue making urgent operational, academic, financial and stakeholder decisions under disrupted conditions. Recovery refers to restoring operations, supporting affected communities, learning from the crisis, and strengthening organisational resilience. Although these phases often overlap, the distinction helps clarify how the chief of staff role evolves over time.

The invisible executive: defining the chief of staff's crisis role

Across the four very different crises, the interviews revealed remarkable consistency in how chiefs of staff described their role. None viewed themselves as the operational leader responding to the crisis. Instead, they distinguished their responsibilities from those of incident commander, emergency manager, chief of police and communications director. Rather than directing emergency operations, they served between these functions and the principal, ensuring that executive leadership remained coordinated, informed and focused on institutional priorities. Participants repeatedly described themselves as the 'nexus' or the 'intersection' through which information, priorities and decisions flowed. As one chief of staff explained, 'My role was primarily the convener… keeping people focused, becoming that nexus where everybody's priorities and issues could funnel back through me.'

Another noted that the role was not about having every answer but about knowing 'exactly who does' and connecting the right people at the right time. While emergency managers directed operations, police ensured public safety, communications managed messaging, and the principals provided visible leadership, the chief of staff aligned these specialised functions into a coordinated executive response.

Success was measured not by public visibility but by the effectiveness of the principal and executive team. As one participant observed, much of the role involved preserving and extending the principal's capacity to lead rather than managing the crisis itself.

These findings extend Jacobs's (2020) characterisation of the chief of staff as liaison, delegate and adviser, and Hood's (2017) and Everage's (2023) descriptions of the role as an institutional integrator. During crises, these established functions intensified into a distinct form of executive integration that connected operational expertise with executive priorities and decision making.

Collectively, the interviews suggest that the chief of staff's defining contribution is not operational command but executive integration. The role provides the connective tissue that links institutional leadership, information and decision making, enabling the institution to respond as a coordinated enterprise rather than a collection of individual units.

This integrative function became especially important when normal structures, communication systems, or decision processes were strained by the speed, ambiguity or emotional weight of a crisis.

Position before the crisis: why relationships matter more than reporting lines

A consistent theme in this study was that effective crisis leadership begins long before a crisis occurs. Participants emphasised that trusted relationships developed with principals, cabinet colleagues, trustees, emergency managers, system-level leadership, and external partners, often proved more valuable than formal reporting structures once an emergency unfolded.

Although many of the functions critical to crisis response—including emergency management, public safety and communications—did not report directly to the chief of staff, participants consistently reported coordinating these functions through influence rather than formal authority. As one participant observed, relationships create role clarity: when leaders trust one another, they are more willing to accept direction from someone who may not supervise them directly. In this way, trust becomes a form of crisis infra-structure when formal structures are strained, enabling rapid coordination, problem solving and decision-making support.

> **'Trust becomes a form of crisis infrastructure when formal structures are strained, enabling rapid coordination, problem solving and decision-making support.'**

One participant summarised this principle succinctly: 'Dig the well before you are thirsty.' The point was not simply that relationships are helpful during crisis, but that trust, credibility and role legitimacy must be solidified before leaders need to rely on them under pressure.

Preparation, therefore, extended beyond maintaining emergency plans. While all participants' institutions conducted tabletop exercises, these often emphasised operational response rather than executive leadership. The recommendation, therefore, was that all institutions—depending on their current level of emergency management preparedness—incorporate scenarios that more explicitly challenge executive decision-making, test communication failures, and require leaders to adapt to rapidly changing conditions.

Participants also reflected that organisational roles became less distinct as crises intensified. Executive policy groups, emergency operations teams, and crisis communications functions, often converged as leaders worked to solve immediate problems. Looking back, they concluded that clearer governance structures, combined with strong relationships and mutual trust, would have strengthened decision-making. As one chief of staff noted, the role had always been to connect people across the institution. During a crisis, that responsibility simply became more visible, and considerably more important.

The first 24 hours: becoming the executive integrator

Although the crises differed significantly in origin and duration, participants described a common pattern during the first 24 hours: the chief of staff's routine role as adviser, connector and coordinator quickly intensified into a crisis leadership function.

Whether responding to a campus shooting or a catastrophic natural disaster, participants described an immediate transition from routine executive support to intensive institutional coordination. The value of the chief of staff became most visible when information was fragmented, stakes were high, and the principal needed both situational awareness and protected capacity to lead.

Tactical responses during crises rightly belonged to emergency management professionals, law enforcement and first responders. As one participant observed following a campus shooting, ‘The preparation that mattered most was the training that our police had. At the end of the day, it was an acute incident, and the threat was addressed immediately. It was in the strategic context that [the chief of staff's role] diverged and it began almost simultaneously with, but separately from, the operational response.’

In the first 24 hours, study participants described themselves as the strategic convener of executive leadership. They established the cadence of executive meetings, synthesised information from across the institution, and ensured that cabinet members remained focused on institutional priorities. One chief of staff described a structured 'meet, break, meet' rhythm in which executive leaders met to assess conditions, returned to implement decisions, and then reconvened as circumstances evolved. This deliberate cadence provided stability amid rapidly changing conditions.

Participants also demonstrated the importance of adaptability in these early hours. During one participant’s experience with a devastating hurricane, the collapse of communications infrastructure forced leaders to abandon planned virtual meetings and rely on face-to-face communication, handwritten notices and improvised technology. In other words, the institution had to 'go old-school analogue.’

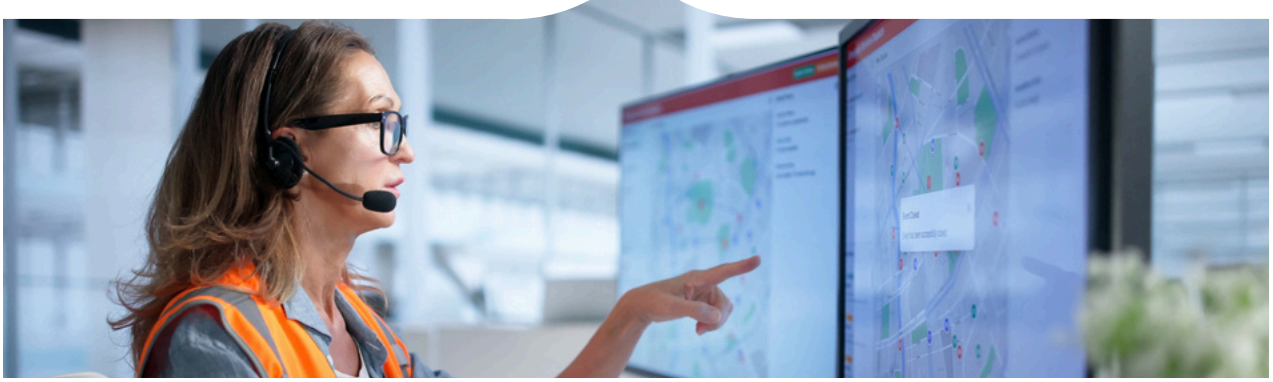
The chief of staff's responsibility was not to restore communications technology, but to preserve executive coordination despite its absence.

Several participants described this function as protecting the principal's capacity to lead. The chief of staff managed executive attention by filtering noise, prioritising issues, and preserving what might be termed leadership altitude. This allowed the principal to remain focused, at a high level, on institutional priorities, external stakeholders and strategic decisions, while operational experts managed the immediate response.

Perhaps the clearest finding is that the chief of staff served as the institution's primary integrator of executive information rather than its principal decision maker.

Participants consistently emphasised that they never possessed every answer. Instead, they connected issues across organisational boundaries and ensured that leaders operated from a shared under-standing of rapidly changing events.

Together, these interviews suggest that the chief of staff's greatest contribution during the first 24 hours is not directing emergency response but enabling executive leadership by transforming fragmented information into coordinated institutional action. This work required judgement, restraint and the ability to influence people and processes without assuming operational command.



Managing the executive team during sustained crisis

As the immediate emergency subsided, the chief of staff's role shifted from coordinating the initial response to helping the institution operate through a sustained crisis, a phase in which urgent decisions continue even after the triggering event has stabilised (Boin, 't Hart, and Kuipers 2018[13]; and Crawford 2020).[14]

Participants regularly described this middle phase as maintaining executive focus while balancing competing priorities. In this phase, under disrupted conditions, chiefs of staff helped institutions continue making urgent operational, academic, financial, communications, and stakeholder decisions.

A recurring challenge noted was preserving the distinction between executive leadership and operational response. Several observed that senior leaders increasingly became immersed in tactical and operational discussions with executive policy groups, emergency operations centres, and crisis communications teams.

While this reflected a shared commitment to solving immediate problems, it sometimes blurred decision-making boundaries and made it harder to distinguish which issues required executive judgement and which belonged to operational experts.

Participants consistently described new challenges emerging as the immediate emergency stabilised. These included helping the institution balance ongoing crisis demands with the need to re-engage broader academic, operational and strategic responsibilities.

As attention gradually shifted beyond life safety and incident response, leaders faced increasing pressure to return focus to matters such as budgets, enrolment, governance activities, academic continuity, athletics and external relationships.

One participant recalled a debate over whether a high-profile sporting event should proceed in the days following a hurricane. The discussion illustrated the difficult trade-offs institutions often face during sustained crises, requiring leaders to weigh financial, reputational and community considerations while operating in an environment of continued uncertainty.

Several participants noted that their role became one of helping executive teams navigate these competing demands, ensuring that crisis-related issues received appropriate attention without allowing the institution to remain indefinitely in emergency-response mode. In practice, this meant helping leaders reassess priorities, maintain institutional focus, and gradually transition from crisis management towards broader institutional stewardship.

Many described themselves as the keeper of executive decisions and institutional intent. In addition to convening leadership teams, they maintained continuity regarding what had been decided, what remained unresolved, and which issues still required executive action. Such stewardship helped prevent repeated deliberations, reduced institutional confusion, and provided stabilising continuity during rapidly evolving circumstances.

A related finding emerged on the distinction between leadership and management. That is, participants consistently argued that the principal's role during crisis was not to become immersed in operational management, but to provide vision, reassurance, external leadership and strategic direction. In this way, chiefs of staff acted as the bridge between management and leadership, helping executive teams

[13] Arjen Boin, Paul 't Hart, and Sanneke Kuipers, 'The Crisis Approach', in Havidán Rodríguez, William Donner, and Joseph E. Trainor (eds), *Handbook of Disaster Research*, 2nd edn (New York: Springer, 2018), pp. 23–38.
[14] Joseph Crawford, 'COVID-19 and Higher Education: A Pandemic Response Model from Rapid Adaptation to Consolidation and Restoration', *Journal of Applied Learning and Teaching*, 3, no. 1 (2020), pp. 1–12.

resolve operational issues before escalating only those matters that required principal-level judgement. As one participant put it, 'The moment we expect the chancellor to be a manager is the moment we've all lost.' The comment captures the chief of staff's responsibility to preserve the principal's leadership altitude by helping the executive team resolve management-level questions before they unnecessarily reach the principal.

Maintaining organisational rhythm also emerged as a critical crisis leadership function. Regular executive meetings allowed leaders to reassess priorities, identify emerging risks and coordinate decisions across the institution. As one participant observed, the chief of staff became the 'convener' of executive leadership—not because of formal authority, but because someone needed to ensure the institution continued to function as a coordinated system.

Decision architecture: information, influence and communications

A key finding of this study is that information (as the primary form of influence) rather than formal authority, is the chief of staff's principal currency during a crisis.

Participants rarely described making the most important institutional decisions themselves. And although participants rarely possessed formal authority over operational units, they exercised significant influence by integrating information streams, connecting stakeholders, surfacing emerging risks and ensuring that executive leaders operated from a shared understanding of events.

This responsibility extended beyond information management to strategic communication. Here, chiefs of staff worked closely with their principal to maintain consistent communication with trustees, system leadership, elected officials and community partners. Maintaining effective communication, even in the direst circumstances, was key to maintaining those trusted relationships.

Participants also emphasised the importance of creating shared situational awareness with their principal and other stakeholders. By filtering competing information and validating facts, chiefs of staff enabled executive leaders to make informed decisions while protecting principals from becoming overwhelmed by operational detail.

'By filtering competing information and validating facts, chiefs of staff enabled executive leaders to make informed decisions while protecting principals from becoming overwhelmed by operational detail.'

Collectively, the interviews suggest that, during sustained crisis, the chief of staff's role is not simply to manage information; it is to transform fragmented operational knowledge into executive understanding. In doing so, the chief of staff enables coordinated decision-making and helps the institution respond with clarity, consistency and purpose. This information function was inseparable from trust: people shared candidly with chiefs of staff because they believed the information would be carried forward accurately, appropriately, and with institutional judgement.

The transition from response to recovery

For the chiefs of staff interviewed, the end of the immediate emergency marked the beginning of a different phase of leadership. As institutions shifted from emergency response to recovery, the chief of staff's focus expanded from coordinating immediate decisions to guiding the institution through a prolonged period of organisational recovery.

Participants described balancing competing priorities, including academic continuity, employee and student wellbeing, financial recovery, external communications and institutional reputation, while supporting executive leaders in making more deliberate, long-term decisions.

Several noted that this phase more closely resembled the traditional work of a chief of staff, albeit under extraordinary circumstances.

Recovery also required sustained engagement with stakeholder groups. During one natural disaster, for example, damaged transportation and communications infrastructure meant that reopening required continuous coordination with external agencies and innovative approaches to maintaining communication. Similarly, following campus shootings, recovery extended well beyond restoring operations to supporting victims and families, planning commemorative events, and fostering community healing.

Perhaps the most enduring responsibility in the recovery phase was ensuring that the institution learned from the crisis. Every participant in the study described extensive after-action reviews that led to revised emergency plans, improved communication protocols, clearer governance structures, and strengthened executive decision-making.

Participants concluded that institutional resilience depends not only on comprehensive emergency plans but also on executive teams that emphasise trust, role clarity, and adaptability under pressure.

'Participants concluded that institutional resilience depends not only on comprehensive emergency plans but also on executive teams that emphasise trust, role clarity, and adaptability under pressure.'

Recovery was consistently described as more than a return to normal operations. Participants discussed redesigning systems, strengthening redundant communication pathways, revising governance structures, creating new support processes, and establishing memorialisation or healing initiatives. In this sense, recovery functioned as a period of institutional redesign in which crisis experience was translated into greater organisational resilience.

One participant emphasised this human dimension directly: 'Don't forget the humanity of it… it's not just we're trying to reopen or we're trying to repair. It's a



community that's been through a major event.' This perspective reinforces that recovery involves not only systems, facilities and plans, but also the lived experience of students, employees, families and communities affected by the crisis.

Taken together, the interviews suggest that the chief of staff serves as the steward of organisational learning, translating crisis experience into lasting institutional improvement (Boin, 't Hart, and Kuipers 2018).[15] Recovery, therefore, is not simply the final stage of crisis management but the foundation for greater organisational resilience. This work also requires attention to the human dimension of recovery, including the wellbeing of students, employees, senior leaders, families and communities affected by the crisis.

Lessons for current and future chiefs of staff

Although the institutions represented in this study faced different crises, the experiences of their chiefs of staff converged around four enduring leadership principles:

1. Build trust before the crisis

Effective crisis leadership is rooted in relationships developed long before an emergency occurs. Trust with principals, cabinet colleagues, emergency managers, trustees, and external partners enables rapid coordination and decision-making when formal structures are under stress. Where CoS-principal relationships are newer or less established, leaders should invest intentionally in trust, role clarity and shared expectations. Uncertainty in these areas can slow coordination when timely decisions are most critical.

2. Lead through influence, not authority

Chiefs of staff are most effective when they can align people, information and priorities, without relying on formal command authority. Credibility, judgement, access and the ability to work across organisational boundaries allow them to serve as institutional integrators during crisis.

3. Protect executive leadership and steward decision-making

A central responsibility of the chief of staff is preserving the principal's leadership capacity by filtering information, prioritising issues and maintaining focus on strategic decisions. Chiefs of staff also help ensure that executive leaders address policy and strategic questions while operational experts manage tactical response, providing continuity around decisions, priorities and unresolved issues.

4. Adapt, recover, and strengthen institutional resilience

While emergency plans provide structure, crises require adaptability. Chiefs of staff help institutions respond to changing circumstances, maintain governance discipline, coordinate recovery efforts, and translate lessons learned into lasting improvements. Recovery is not simply a return to normal operations but an opportunity to strengthen systems, relationships and organisational resilience.

'Recovery is not simply a return to normal operations but an opportunity to strengthen systems, relationships and organisational resilience.'

[15] Arjen Boin, Paul 't Hart, and Sanneke Kuipers, 'The Crisis Approach', in Havidán Rodríguez, William Donner, and Joseph E. Trainor (eds), *Handbook of Disaster Research*, 2nd edn (New York: Springer, 2018), pp. 23–38.

Conclusion

The findings of this study suggest that the chief of staff's most significant contribution during a crisis is not directing emergency operations but extending executive leadership.

While different institutional structures may assign aspects of this work to deputy leaders, chief operating officers, or other senior administrators, participants consistently described the chief of staff as uniquely positioned to integrate people, information, decisions, and institutional priorities on behalf of the principal. By doing so, chiefs of staff help institutions maintain leadership coherence when normal structures, communication systems, and decision processes are under stress.

Across preparedness, response, sustained crisis and recovery, participants consistently described the chief of staff as the nexus through which people, information, decisions and institutional priorities converge. Operating primarily through trust, influence, relationships and proximity to the principal—rather than formal authority—they help leaders maintain focus, ensuring shared situational awareness and coordinated action across organisational boundaries. As one participant observed, the role is about 'keeping people focused'. Ultimately, the chief of staff's value in a crisis is not command, but integration: enabling institutions to act as a coherent enterprise when it matters most.

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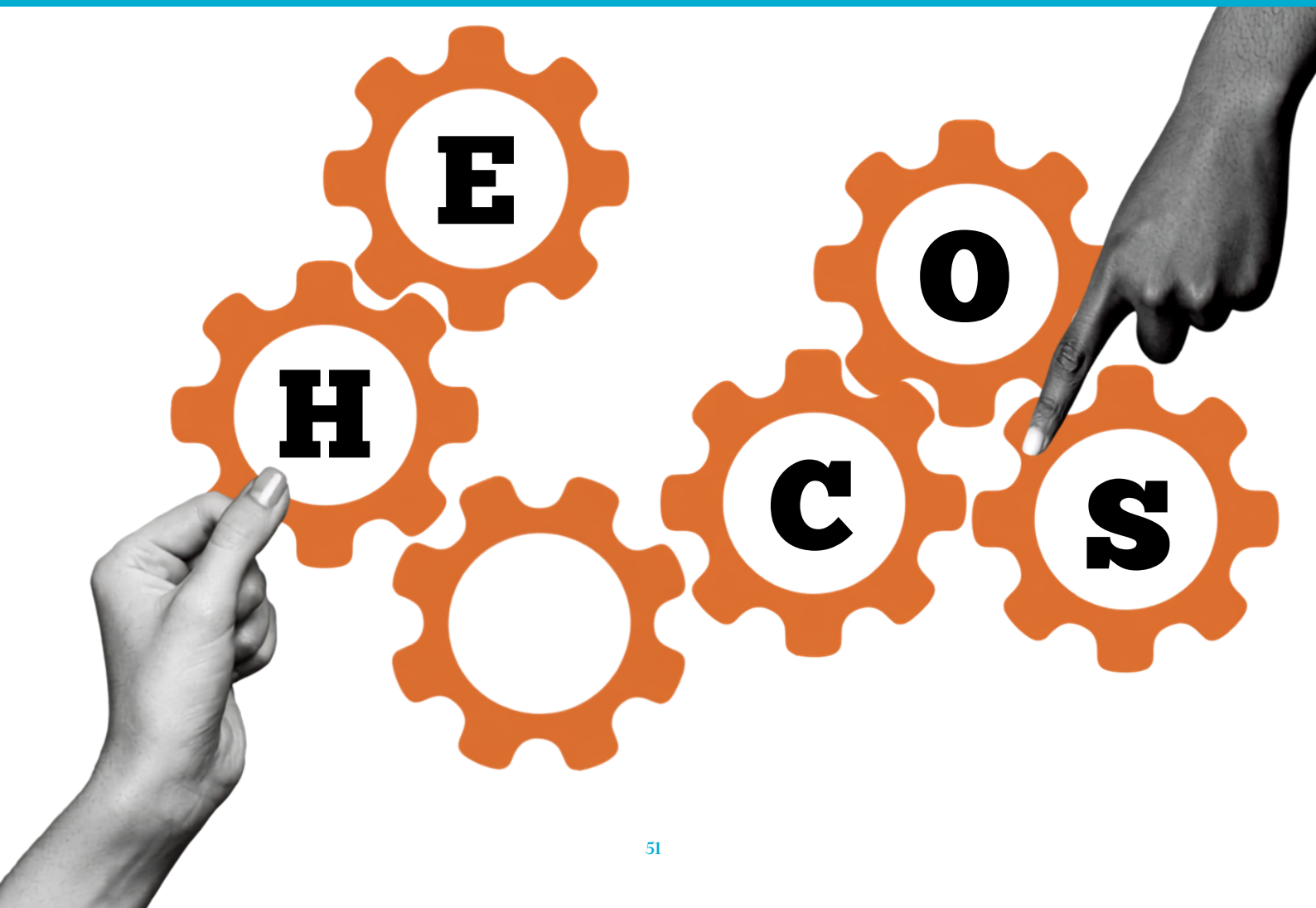
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The chief of staff as institutional integrator:

Leadership, governance, and strategic alignment in higher education

Elliott D. Farmer



The chief of staff as institutional integrator

Elliott D. Farmer

Abstract

Higher education institutions operate within complex environments characterised by shared governance, distributed authority, competing priorities, and increasing demands for organisational agility. Within this context, the chief of staff should serve not merely as an executive adviser or coordinator, but as an institutional integrator who helps translate executive vision into coordinated institutional action.

This article presents institutional integration as a framework for understanding the strategic contribution of the higher education chief of staff. It identifies five interconnected leadership practices—governance fluency, strategic translation, cross-functional leadership, relational credibility, and collaborative leadership through influence—that enable chiefs of staff to navigate organisational boundaries, and foster alignment among stakeholders with distinct responsibilities and sources of authority.

Collectively, these practices demonstrate how the chief of staff can strengthen connections among governance, strategy, relationships and execution. The article ultimately argues that the value of the role should be assessed not simply by proximity to executive leadership or administrative efficiency, but by its capacity to help the institution move collectively towards shared strategic priorities.

Introduction

The landscape of higher education is characterised not only by its size and organisational structure, but also by a complex governance model in which authority is intentionally distributed among governing boards, executive leadership, faculty, administrative divisions, and external stakeholders. Each of these entities plays a distinct role that collectively supports the institution's mission, distinguishing colleges and universities from other sectors. For example, a governing board may exercise fiduciary and strategic oversight while faculty retains authority over academic matters, and administrative leaders oversee the operational systems that support the institution. This model fosters academic freedom, ensures institutional accountability, and promotes collaborative decision-making.

However, it also creates a condition in which strategic leadership relies less on hierarchical authority and more on fostering alignment among various centres of influence.[1]

[1] See AGB, *AGB Board of Directors' Statement on Shared Governance* (Washington, DC: Association of Governing Boards of Universities and Colleges, 2017); Robert Birnbaum, *How Academic Leadership Works: Understanding Success and Failure in the College Presidency* (San Francisco: Jossey-Bass, 1992); and Adrianna J. Kezar and Elizabeth M. Holcombe, *Shared Leadership in Higher Education: Important Lessons from Research and Practice* (Washington, DC: American Council on Education, 2017).

These dynamics have become increasingly relevant as higher education faces unprecedented pressures. Factors such as financial constraints, demographic changes, workforce transformations, technological advancements, increased public scrutiny, and shifting student expectations have altered the pace and nature of institutional leadership. Institutions are now expected to respond with greater agility while remaining grounded in the governance traditions rooted in academia. Consequently, strategic priorities are no longer confined to individual divisions; addressing institutional challenges requires a coordinated, enterprise-wide approach that connects governance, leadership, operations and organisational culture.[2]

In this context, the chief of staff is increasingly positioned as a strategically consequential leadership function in higher education. Traditionally seen as executive advisers and project managers, the scope of the position in HE has expanded significantly. Contemporary chiefs of staff work across institutional boundaries rather than being confined to functional silos. They facilitate collaboration among academic and administrative leaders, enhance organisational communication, anticipate governance implications, coordinate strategic initiatives, and ensure that executive priorities translate into actionable outcomes. Their responsibilities now extend beyond providing executive support to encompass broader enterprise leadership.

Despite the increasing significance of the position, existing literature has not extensively explored the unique contributions of the chief of staff in HE.

Scholarship has examined shared governance as a framework for distributed institutional decision-making, shared leadership as a means of engaging expertise across organisational boundaries, and systems thinking as an approach to understanding institutional interdependencies.[3] Less attention has been given to the position operationalising these principles across the institution.

'Financial constraints, demographic changes, workforce transformations, technological advancements, increased public scrutiny, and shifting student expectations have altered the pace and nature of institutional leadership.'

This article argues that the chief of staff should serve as an institutional integrator within higher education. Unlike many executive roles, the chief of staff is uniquely positioned to convert executive vision into effective cross-functional coordination, organisational alignment, and strategic execution in environments marked by shared governance and distributed authority. This role is neither automatic nor guaranteed by title; it depends on whether the chief of staff is positioned and empowered to operate across institutional boundaries.

Achieving institutional integration necessitates more than administrative skills or project management expertise: it demands governance fluency, relational credibility, collaborative leadership, and the capacity to exert influence across intricate organisational systems where authority is not the sole driver of progress.

The concept of institutional integration offers a practical framework for examining this responsibility. It shifts attention from what the chief of staff manages, to how the chief of staff enables the institution to act collectively. In increasingly complex higher education environments, the strategic value of the role should therefore be assessed not merely through administrative efficiency or proximity to executive leadership, but through the institution's capacity to align

[2] See Birnbaum (1992); Kezar and Holcombe (2017); and Peter M. Senge, Art Kleiner, Charlotte Roberts, Richard B. Ross, and Bryan J. Smith, *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization* (New York: Currency Doubleday, 1994).

[3] See AGB *(2017);* Kezar and Holcombe (2017); and Senge et al., (1994).

governance, people, and execution around shared priorities. The five leadership practices examined in this article illustrate how that integration can occur in practice.

Higher education requires a different kind of chief of staff

Higher education requires a distinct approach to leadership because institutional authority is distributed rather than concentrated. For the chief of staff, this means that strategic progress often depends on navigating multiple centres of expertise, authority and influence, rather than relying primarily on positional power. The role must therefore operate across institutional boundaries while respecting the governance structures that distinguish colleges and universities from more hierarchical organisations.[4]

Shared governance is characterised by collaborative relationships among governing boards, presidents, and faculty, with each possessing distinct yet complementary responsibilities in advancing the institutional mission.[5] Effective governance, therefore, depends not on one constituency dominating another, but on clearly defined roles, mutual respect, and collaborative engagement. For the chief of staff, this governance landscape is pivotal. Unlike executives whose responsibilities are concentrated within a particular functional area, the chief of staff in higher education must navigate institutional priorities spanning academic affairs, finance, enrolment management, human resources, and student affairs. This enterprise-wide perspective is essential because workforce initiatives, accreditation requirements, resource decisions, and operational changes can have implications across multiple areas of the institution.

Consequently, the chief of staff role transcends functional expertise. It demands an understanding of how institutional systems interact and influence one another. Rather than leading primarily through vertical authority, the chief of staff works across the institution, forging connections among leaders with differing authority, expertise and responsibilities, while maintaining focus on collective outcomes.

'The chief of staff works across the institution, forging connections among leaders with differing authority, expertise and responsibilities, while maintaining focus on collective outcomes.'

Moreover, the academic culture of higher education further differentiates the chief of staff from counterparts in other sectors.

Universities function as communities of expertise, where faculty exercise authority within the academic domain, administrative leaders contribute specialised operational knowledge, and governing boards provide strategic and fiduciary oversight. Each group contributes to the institution's mission from a distinct perspective and expects meaningful engagement in decisions that affect its responsibilities.[6]

Effective chiefs of staff understand that these differing perspectives, even when they compete, represent legitimate institutional interests that must be understood and aligned around shared priorities. This alignment requires governance fluency, the ability to comprehend how institutional authority operates, where influence lies, and how relationships affect strategic outcomes. Governance fluency encompasses not just procedural knowledge, but also institutional judgement and organisational awareness cultivated through experience.

[4] See Birnbaum (1992); Kezar and Holcombe (2017); and Senge et al., (1994).
[5] See AGB (2017).
[6] See Birnbaum (1992); AGB (2017); and Robert A. Scott, 'Leadership Threats to Shared Governance in Higher Education', *Journal of Academic Freedom*, 11 (2020).

The chief of staff as institutional integrator

Every institution has a vision and strategic priorities, yet the successful execution of strategy often hinges on sustaining organisational alignment, especially in complex environments. This is where the chief of staff adds significant value. As higher education institutions become increasingly interconnected, effective integration becomes essential. Institutional integration is the process of translating executive vision into coordinated action by aligning governance, leadership, and operational execution. It extends beyond management techniques. It is about helping institutions move collectively towards strategic priorities while respecting their distributed authority.

The difference between coordination and integration is key. Coordination manages activities, while integration fosters alignment. An institution can coordinate without meaningful strategic progress, whereas integration ensures that stakeholders understand and collectively advance institutional priorities.

For the chief of staff, evidence of integration becomes visible when executive priorities begin to shape decisions beyond the executive office: divisional plans reflect the broader strategy, leaders allocate resources accordingly, cross-functional teams assume ownership of shared outcomes, and stakeholders can articulate how their work contributes to institutional objectives. Success, therefore, is measured not simply by project completion but by the extent to which executive priorities become embedded in institutional decision-making and action.

Strategic decisions rarely affect only one area; they often create implications across multiple institutional systems. Therefore, recognising these interdependencies before implementation is vital. Chiefs of staff develop this awareness by listening across constituencies, participating in executive and cross-functional discussions, reviewing strategic and operational plans, observing where decisions create downstream effects, and soliciting feedback from leaders responsible for implementation. Over time, these interactions allow the chief of staff to identify patterns, anticipate points of friction, and recognise where a decision in one area may create consequences elsewhere in the institution. This work relies on five interconnected leadership practices that operate simultaneously and provide the foundation for institutional integration:

1. Governance fluency

The concept of governance fluency is crucial for institutional integration. Effective chiefs of staff possess a deep understanding of governance structures and institutional policies, but their insight goes beyond this. They comprehend how legitimacy is established in decision-making, where influence operates, and how governance relationships ultimately affect institutional outcomes. These leaders recognise that the successful implementation of policies often hinges on engaging the right stakeholders at the right times, rather than merely speeding up decision-making.[7]

Governance fluency empowers chiefs of staff to proactively address institutional dynamics before they become obstacles. Instead of merely responding to resistance, they seek out collaboration opportunities early in the decision-making journey. Rather than perceiving governance as a procedural obligation, they regard it as a strategic asset that can drive institutional success. In the realm of higher education, governance is intricately linked to leadership; it is

[7] See AGB (2017); Scott (2020); and Rita Bornstein, 'Transforming Institutions Through Shared Governance', *Trusteeship Magazine* (Washington, DC: Association of Governing Boards of Universities and Colleges, September/October 2012).

fundamentally a means through which leadership is expressed.

2. Strategic translation

Executive leaders set the direction for their institutions, while chiefs of staff play a pivotal role in translating that direction into a shared understanding across the organisation. This translation process is often overlooked, occurring in the critical space between strategic planning and operational execution. For example, an institution may identify operational modernisation as a strategic priority through the implementation of a new enterprise resource-planning system. Executive endorsement alone does not make that priority institutional. The chief of staff can help translate the broader objective across functional areas by connecting the implementation to financial stewardship, workforce effectiveness, data integrity and improved institutional operations, while ensuring that leaders understand their respective responsibilities in achieving the desired outcome. This mode is vital in determining whether institutional priorities become embedded throughout the institution or remain limited to discussions among executives.

It is important to note that different institutional communities interpret the same strategic priorities through diverse professional lenses. Faculty members evaluate initiatives based on academic quality and alignment with the institutional mission. Financial leaders focus on fiscal sustainability and resource allocation, while human resources professionals consider organisational capacity and workforce impacts. Student affairs leaders, on the other hand, prioritise the student experience.[8]

None of these perspectives is inherently incorrect; each reflects a legitimate duty within the institution. The chief of staff's role, therefore, is not to eliminate these differences but to weave them together. Strategic translation fosters a collective understanding without necessitating uniformity across the institution. It allows various constituencies to see how their individual contributions align with overarching institutional priorities while maintaining the unique expertise that enriches collaboration. Ultimately, a vision becomes institutional only when it is comprehended collectively.

3. Cross-functional leadership

Institutional integration necessitates a type of leadership that transcends organisational boundaries. Typically, the chief of staff does not have direct oversight of all divisions involved in executing strategic initiatives, which makes influence a vital component of their role. Cross-functional leadership focuses on facilitating collaboration among leaders with varying expertise, priorities, and organisational responsibilities, while ensuring a shared commitment to institutional outcomes.[9]

This leadership approach often operates in the background. The success of institutional integration may go unnoticed, as collaboration seems seamless once alignment is achieved. The discussions that eliminate misunderstandings, the relationships that foster trust, and the coordination that reconciles conflicting priorities often remain hidden from view. However, these undertakings play a crucial role in determining whether institutional initiatives progress smoothly or encounter unnecessary challenges. Cross-functional leadership enables disparate organisational efforts to coalesce into cohesive institutional advancement.

4. Relational credibility

In the context of a chief of staff, no asset is as critical as credibility. Unlike many executive

[8] See Birnbaum (1992); and Kezar and Holcombe (2017).
[9] See Kezar and Holcombe (2017); and Senge et al., (1994).

roles that depend on formal authority, the effectiveness of a chief of staff often relies on their ability to influence others. This influence is cultivated through professional judgement, discretion, consistency, fairness, and the trust established over time.[10]

Relational credibility is not derived from organisational hierarchies; rather, it is earned through consistent daily interactions. Chiefs of staff build this credibility by communicating transparently, safeguarding confidentiality, acknowledging diverse institutional perspectives, and demonstrating a steadfast commitment to the institutional mission over individual interests. These behaviours foster confidence among leaders who may have differing responsibilities but must collaborate effectively. It is important to note that while relationships are fundamental, they do not substitute for strategy—they serve to facilitate its implementation.

5. Collaborative leadership through influence

In higher education, effective leadership often relies more on influence than on traditional hierarchical structures. The role of the chief of staff strongly embodies this approach. Leadership in complex institutions necessitates building commitment among stakeholders rather than merely ensuring compliance. It involves actively listening before directing, facilitating discussions before making decisions, and fostering connections before coordinating efforts. These practices help cultivate the trust essential for tackling adaptive challenges that cannot be addressed through authority alone.[11]

It is important to clarify that influence transcends mere informal persuasion or interpersonal skills. In higher education, influence is rooted in institutional credibility, which develops when chiefs of staff consistently demonstrate sound judgement, awareness of governance, strategic insight, and a genuine commitment to the institution's success. Over time, such credibility enables the chief of staff to initiate conversations, navigate difficult decisions, and align leaders who operate independently yet share increasingly interconnected responsibilities.

These five leadership practices illustrate how institutional integration occurs in practice and underscore the growing importance of the chief of staff role in higher education today. Institutions benefit from leaders who can navigate governance structures, organisational boundaries, and diverse professional cultures while upholding strategic coherence—a unique requirement seldom addressed by other executive roles. The chief of staff serves this specific purpose, making institutional integration not just an alternative description of the profession, but its defining strategic contribution.

Institutional integration in practice

The five practices of governance fluency, strategic translation, cross-functional leadership, relational credibility, and collaborative leadership through influence are most effective when they operate together rather than independently. Institutional integration occurs at their intersection. Governance fluency helps the chief of staff understand where authority and influence reside; strategic translation creates shared understanding; cross-functional leadership connects work across organisational boundaries; relational credibility establishes the trust necessary for collaboration; and influence enables progress where formal authority alone is insufficient. Together, these practices create the conditions for organisational alignment.

When these practices are working collectively, organisational alignment becomes visible in institutional behaviour. Strategic priorities begin to influence divisional plans and resource decisions; leaders understand how their responsibilities

[10] See Birnbaum (1992); and Kezar and Holcombe (2017).
[11] See Ronald A. Heifetz, *Leadership Without Easy Answers* (Cambridge, MA: Belknap Press of Harvard University Press, 1994).

connect to broader institutional objectives; cross-functional initiatives demonstrate shared ownership rather than dependence on a single executive office; and emerging challenges are addressed across organisational boundaries rather than within isolated functions. Alignment, therefore, is not a static condition achieved through a strategic plan or periodic leadership meeting. It is an ongoing institutional capacity that must be cultivated and sustained.

Conclusion

The question for higher education leaders is not simply whether an institution has a chief of staff, but whether the role is positioned to create institutional integration. A chief of staff may be highly effective at managing executive priorities, coordinating projects, and supporting a principal while still lacking the mandate, relationships or institutional access necessary to operate across organisational boundaries. If governance fluency, strategic translation, cross-functional leadership, relational credibility, and collaborative influence are essential to integration, then principals and chiefs of staff must consider whether the role has been designed and empowered to exercise them.

The consequences become most visible when integration begins to weaken. Strategic priorities may remain concentrated within the executive office, constituencies may interpret institutional direction differently, functional areas may pursue competing objectives, and initiatives may stall despite considerable activity. These conditions do not necessarily indicate an absence of leadership or effort. They may instead signal that the connections among governance, strategy, relationships, and execution have begun to fracture. For the chief of staff, recognising those signals creates an opportunity to re-establish alignment before fragmentation becomes institutional inertia.

The enduring value of the chief of staff should therefore be measured not by proximity to the principal or the volume of activity coordinated, but by the institution's increased capacity to move collectively towards its priorities. For principals and chiefs of staff alike, the defining question may be this: Is the role merely helping the executive lead, or is it helping the institution move together?

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Conversations exploring the chief of staff role in US medical schools

Anita M. Navarro
Cecilia Garza Madden
Kelly Lockeman

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Two focus groups map six domains of the chief of staff in MD-granting schools.

The case for understanding the role in medical schools

Physician training in the United States occurs in medical schools as a professional degree (Doctor of Medicine or MD) beyond the initial bachelor's degree. In addition to educating physicians, medical schools advance research that improves health, and provide care to patients. Through the impact of these three missions, medical schools make a substantial contribution to society, which means that leadership roles in these organisations are extremely critical and impactful.

In the US, there are 163 medical schools that grant the MD degree. As a specialised segment of higher education, they frequently operate as uniquely complex entities within their parent universities and health systems. Although medical schools share the missions of education, research and clinical care, a common adage about them is 'If you've seen one medical school, you've seen one medical school', meaning each school is distinctive. This distinction plays out in many ways, but especially in the organisational structure and configuration of each school's leadership team.

Medical school leadership teams often include senior roles overseeing education, research, faculty affairs, clinical practice, alumni affairs, philanthropy, finance and administration, who report to a dean as the chief executive of the school. As medical schools have grown in size and complexity, chief of staff positions have recently emerged as a relatively new component of school leadership teams (Holman, 2026).[1] Approximately 40 individuals are listed as chiefs of staff on a new discussion board recently launched by the Association of American Medical Colleges (the national professional organisation for medical schools).

'Medical schools make a substantial contribution to society, which means that leadership roles in these organisations are extremely critical and impactful.'

Despite their increasing prevalence, little is known about the structure of these roles, who occupies them, or how they contribute to organisational effectiveness in this setting. Consistent with how medical schools are unique from each other, there is likely variability in responsibilities, backgrounds, and organisational influence. A greater understanding can support individuals in inaugural positions, their deans and schools, and the development of others aspiring to this leadership role.

Focused conversations

With this in mind, we set out to obtain foundational knowledge about the ways in which the chief of staff role manifests within US MD-granting medical schools. We held two focus groups and talked with four medical school chiefs of staff who conversed with us on the scope of their roles, their professional backgrounds and experiences, credentials and training, and perceived barriers and opportunities. Our participants were invited from a professional learning community of chiefs of staff convened by CFAR, a consulting and coaching firm with extensive experience in academic medicine and higher education.

The cohort came from a new medical school, well-established medical schools, public and private medical schools, and community-based and research-intensive medical schools. Our discussants were all women in both permanent and interim chief of staff roles. Their years in the role ranged from two to eight years. Gender was not considered during the analysis as there were no male participants with whom to draw comparisons. There may be some study nuances based on gender that our analysis cannot represent.

We asked questions through a structured script that covered six domains, recorded and transcribed the sessions, anonymising the participants to protect their confidentiality, and analysed the perspectives across six domains based on Goodman's *Chief of Staff: Anatomy of the Role in Eight Charts* (2024)[2] and using framework analysis outlined by Ritchie & Spencer (1994)[3] and Gale et al. (2013).[4]

What we learned about medical school chiefs of staff

Across the six domains of our framework, shared sentiments about this leadership role emerged [see Figure 1].

1. Role scope and responsibilities

Common activities across the four individuals' portfolios include strategic communications, strategic planning, initiatives and projects, governance activities, advisory board support and executive advising. Additionally, the individual might work in other areas like philanthropy or government relations depending on the organisational need and their skills. One participant outlined their work as:

> 'Many of the chief of staff responsibilities, I [liken to] being a right-hand [to the dean], so speechwriting, executive communications, advice, counsel, consultation on very high-level politics, campus politics, statewide politics. Many of those, I think [are] typical of a chief of staff role. What has evolved over time, maybe based on skills that I brought to the table [is] I now oversee our marketing and communication efforts for the school, as well as our community engagement, service and outreach efforts.'

Other participants endorsed this scope along with special initiatives and strategic planning. Sometimes the scope of the role was broad and, at other times, narrow. As one participant put it:

> '[The] chief of staff is central to everything… so, balancing that takes a lot of engagement, visibility, just being seen as a senior leader who is an extension of the dean, or a senior leader who has that 10,000 square foot vantage point.'

[1] Jordyn Holman, 'Why So Many CEOs Are Getting a Chief of Staff', *New York Times*, 6 August 2026.
[2] Andrew Goodman, 'Chief of Staff: Anatomy of the Role in Eight Charts', *McKinsey & Company*, August 29, 2024.
[3] Jane Ritchie and Liz Spencer, L., 'Qualitative Data Analysis for Applied Policy Research', in *Analyzing Qualitative Data*, ed. by A. Bryman and R.G. Burgess (London: Routledge, 1994), pp. 305–329.
[4] Nicola K Gale, Gemma Heath, Elaine Cameron, Sabina Rashid and Sabi Redwood, 'Using the Framework Method for the Analysis of Qualitative Data in Multi-disciplinary Health Research', *BMC Medical Research Methodology*, 13 (2013), p. 117 <https://doi.org/10.1186/1471-2288-13-117> [accessed 11 August 2026].

2. Skills, training and credentials

Key skills for success in the role were identified. These include interpersonal communication, diplomacy, relationship-building, tolerating ambiguity, consensus-building, strategic thinking, and project management.

The capability to build trust and be viewed as a credible partner—despite not having a clinical background—was also articulated as a critical skill.

Communication and relationship-building skills were considered essential. 'I put a lot of stake and value in relationships and trying to curate those with my colleagues,' one explained. Another emphasised the importance of being friendly, personable, open and accessible: 'People don't hesitate to give me a call, or to email me, or to ask me something, when they need it.'

Additionally, participants noted being clear, honest and a translator in multiple directions (up, down and laterally). There was also a shared sentiment of supporting other leaders by pressure-testing ideas before they are communicated to the dean.

3. Organisational positioning and influence

Each of these chiefs of staff reported directly to the dean, participated in the dean's cabinet, bridged between groups, and set agendas. A common sentiment was that their influence did not come from positional power. Rather, it was informal and relationship-based, cultivated through visibility and cross-organisational connectivity. They noted that being an extension of the dean is a defining feature of the role, and used terms like, 'right hand', 'executive adviser', and 'partner' to elaborate upon their positioning and influence.

One noted that where positional authority was limited, 'influence' is gained when 'relationships and trust' are grown.

Each participant, in turn, displayed characteristics of systems thinking—or seeing the connection of the parts to the whole—and articulating clearly how the dimensions of their roles intersect with each strategic pillar of the organisation.

4. Backgrounds and career pathways

The four chiefs of staff in the study had backgrounds within, and external to, higher education (HE). Those with HE experience came from student affairs or research administration, and those with external experience had worked in government relations, consulting or operations. For each, the transition designated a shift from a specialist position into a more generalist role. None were trained as clinicians, and therefore were not involved in caring for patients directly, and each articulated that their dean leveraged their individual backgrounds, which shaped their role in their school.

5. Challenges and opportunities

Each mentioned that faculty personnel issues, financial pressures, AI, workforce changes, and external uncertainty were common challenges across their positions.

One observed that the current US federal funding landscape has 'really changed'. Funding that was available 'for years' is no longer guaranteed, with 'constant fear from DC' creating challenges in the organisation.

Organisational complexity was also noted as a hurdle for the role. Each worked in highly matrixed structures with university bureaucracy that still required integration.

However, there were also opportunities to shape the health of their communities, serve their executives and organisations well, and make a meaningful contribution.

'Each mentioned that faculty personnel issues, financial pressures, AI, workforce changes, and external uncertainty were common challenges across their positions.'

6. Role evolution and future outlook

Medical school chief of staff roles are growing, though with an unclear career trajectory. Participants shared that serving in inaugural roles meant there was not a clear, linear pathway into, or out of, their current position. Career pathways remain poorly defined and, simultaneously, highly individualised. The aspirations of these individuals include additional senior roles in higher education or healthcare, as well as being open to, and undecided about, what is next.

Other observations revealed

Outside of the above six domains, a number of other considerations emerged from the study. These include the themes of servant leadership, the paradox of connectivity and isolation, and role translation.

The participants indicated that while building relationships and being a 'connector' are core skills, the chief of staff position can be isolating because of the political sensitivities of the remit, its position in the organisation, and the need for impartiality.

These individuals enjoyed meeting other chiefs through the focus group and said that connecting with others in the role could be helpful. This suggests the desire for a community of practice (*Navigating the Jagged Frontier*, 2026).[5]

Each participant indicated serving, in a complementary manner, the dean and other executives, particularly in a non-clinical capacity. We observed that they were selfless in their role orientation, indicating that success means doing the best for their organisation.

They also saw themselves as translators, ensuring alignment across the mission of their schools and supporting the dean's vision with other leaders, faculty, staff and students.

One participant shared that 'Coordination among [the dean's] various vice-deans' was a key activity. They had to be flexible in their capabilities, filling in gaps in skills, abilities, time or other needs of their leadership team.

As part of the framework analysis, we were looking for 'confusion about responsibilities' and struggles in 'balancing competing demands' but participants did not speak in these terms. They seemed to handle what are obviously challenging roles with extreme diplomacy and care, as evidenced by

'The chief of staff position can be isolating because of the political sensitivities of the remit, its position in the organisation, and the need for impartiality.'



[5] 'The power of finding your tribe', *Navigating the Jagged Frontier: A Special Report from the Chief of Staff Association Executive Education Programme at Harvard Business School 2025* (New York: Chief of Staff Association, 2026), p. 11.

comments like, 'We have to care for ourselves and each other', 'I put a lot of stake and value in relationships and trying to curate those with my colleagues', and 'Being diplomatic: there are a lot of things that come our way. I try to understand the situation before we jump too fast in something.'

We also noticed that, when probed, our participants maintained open body language, spoke with confidence, and remained calm. This piqued our interest in further investigating the personality traits (e.g. grace and groundedness) of those in the position.

While these chiefs of staff envisioned eventually moving to other leadership roles, they also indicated the need for clearer career pathways, role models and mentoring, in order to do so.

'As medical schools continue to navigate increasing administrative demands, complex partnerships, and rapid environmental change, the chief of staff position plays a critical role in supporting institutional strategy, coordination, and execution.'

Limitations

We acknowledge several limitations of this study. First, the project intentionally uses a purposive sample, which Campbell, et al., describe as appropriate for gaining a deep understanding of a phenomenon.[6]

While appropriate for an initial study on medical school chiefs of staff, we only had four participants. As a result, we may not have reached data saturation, which is important in qualitative research using a purposive sample. We also restricted participants to those employed by MD-granting schools. No osteopathic medical schools were represented, so nuances between different types of medical schools may be missed. Additionally, this is a US-focused study. Medical schools in other countries have different structures and experiences that are not represented here.

Finally, we were limited in that only women chiefs of staff participated in our study; male chiefs of staff may have different perspectives that were not captured.

Implications for medical schools and beyond

Despite these limitations, documenting the contours of this emerging leadership role offers an initial understanding of how medical schools incorporate the position as part of their leadership structures.

The study also provides insights into previously unknown details about individuals in the function. As medical schools continue to navigate increasing administrative demands, complex partnerships and rapid environmental change, the chief of staff position plays a critical role in supporting institutional strategy, coordination and execution. Additionally, the participants in our study seem to reflect the 'subtle' transformation of the chief of staff identity and function acknowledged by Al-Ghumaiz and Al-Ohali (2026), where medical schools achieve greater organisational and governance coherence and action because of the individuals in the function.[7] As each

[6] Steve Campbell, Melanie Greenwood, Sarah Prior, et. al, 'Purposive Sampling: Complex or Simple? Research Case Examples', *Journal of Research in Nursing*, 25/8 (2020), pp. 652–661.
[7] Sulaiman S. Al-Ghumaiz and Mohammad Al-Ohali, 'The Quiet Rise of the Chief of Staff: From Executive Support to Enterprise Integrator and Advisor, the Saudi Energy Framework', *The Chief of Staff, The Unowned Problem*, 8/1 (New York: Chief of Staff Association, 2026), p. 68.



participant's transition into the role was from a specialist position to a more generalist one, this sparks a deeper research question of how did they (or their dean) know they were well-suited for that type of switch?

We also hypothesise that our findings might resonate with chiefs in other industries, especially on the themes of scope, responsibilities and influence. Further investigation could elucidate cross-industry perspectives. It would also be enlightening to know how career pathways and challenges could be similar or different across industries.

From a qualitative perspective, our study revealed foundational information and commonalities across medical school chief of staff roles. With this groundwork, we anticipate initiating future research to continue to understand the role of medical school chiefs of staff more broadly and those who serve in it. We plan to conduct additional focus groups and field a survey to capture the full complement of individuals who serve in the function.

A more complete understanding of this emerging leadership role will support those in the post as well as the deans considering hiring for, or creating, the position. This may also inform the impact of the role in healthcare writ large. It would also be informative to examine the CoS-dean dynamic, including interviewing deans, which was out of scope of this study.

We wish to convey our gratitude to the chiefs of staff who participated in our sessions for their willingness to share their experiences and insight.[8]

'A more complete understanding of this emerging leadership role will support those in the post as well as the deans considering hiring for, or creating, the position.'

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[8] This study was approved by the Virginia Commonwealth University Institutional Review Board as exempt [HM300001416].

Figure 1: The chief of staff in MD school framework



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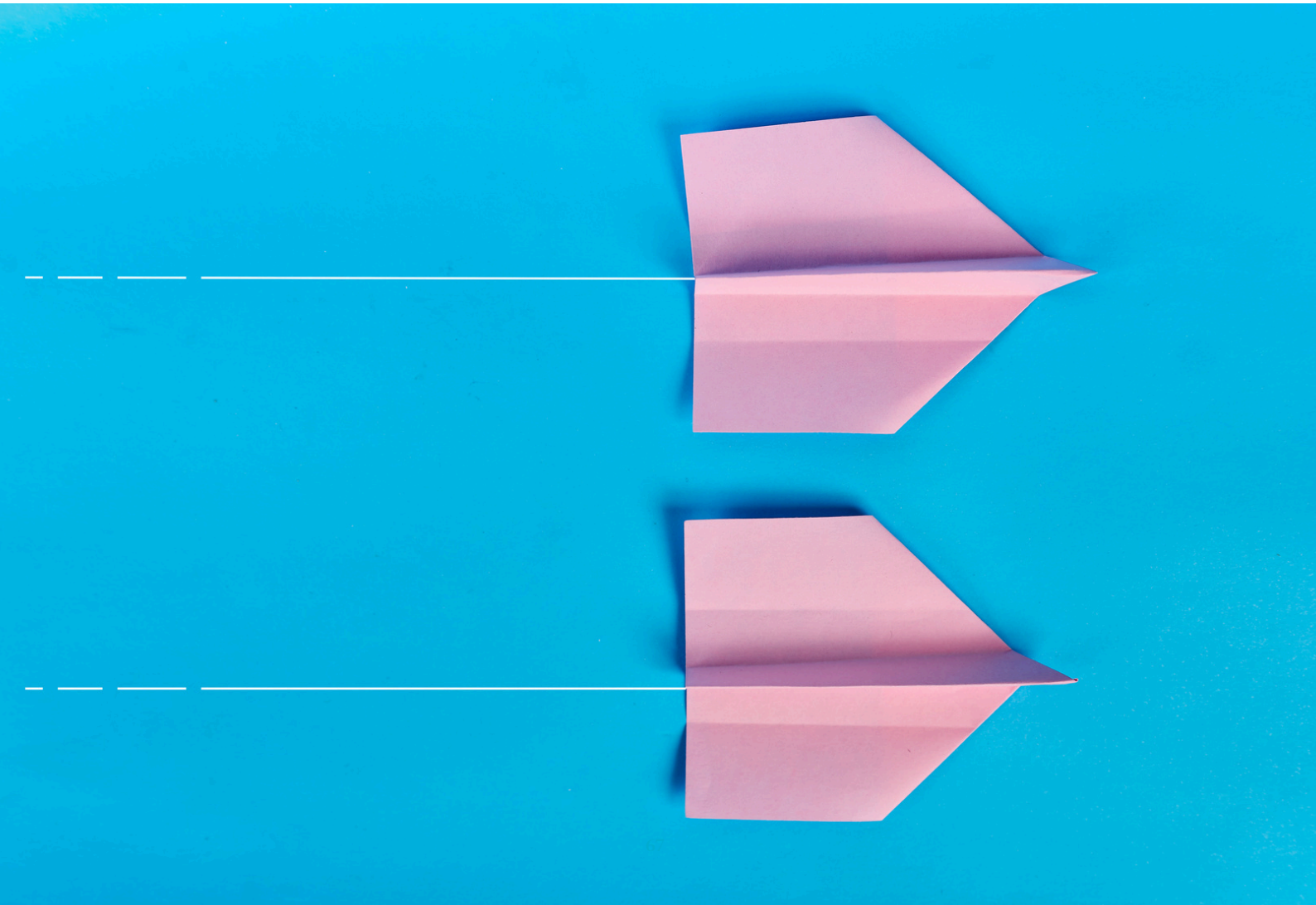
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‘Improvisation with direction’:

A dean and chief of staff on designing the partnership together

Heather Johnson
Penny A. Bishop



‘Improvisation with direction’

Heather Johnson
Penny A. Bishop

A dean and assistant dean-chief of staff describe the strategies they used to create the partnership together.

‘What is the role of a chief of staff and how might we work together to build it?’

As newcomers to the dyad—Heather as first-time chief of staff and Penny as first-time principal—we posed these two questions to frame the design task ahead of us: establishing a new chief of staff role.

Reflecting on our experience within a college of education, we offer here a set of design principles for others (higher education leaders and new chiefs of staff) who may be considering adopting the role in a context without an existing model. Given the iterative nature of any chief of staff role, we also hope that this article offers useful insights to established pairs.

We focus here on the first nine months of the CoS-dean partnership, which served as a critical period of building. Given the role was a new one, we explored those two, interrelated, design questions concurrently during this period. The first—what is the role of a chief of staff—was tactical, focused on defining the boundaries and responsibilities of the role itself. The second—how might we work together to build it—was relational, focused on the processes of learning and doing that support that definition. We quickly learned that both were essential to the success of the partnership.

We also learned that answering these questions depended on three related components of the design phase.

First, doing careful upfront work, particularly during the interview and hiring process, helped shape the relational foundations of the match. Second, taking a deliberately emergent approach, grounded in a shared vision for the work and the role, allowed the details to develop through ongoing refinement. And finally, building intentional structures for reflection and feedback helped us cultivate psychological safety within the working relationship.

Building the foundation: the interview as first design conversation

The importance of compatibility between a principal and a prospective chief of staff is both widely accepted (Ciampa, 2020; Kadzielski, 2025) and supported by research (Jacobs, 2020; Kristof-Brown et al., 2005).[1] Building something new together, however, adds a dimension of co-design to the working relationship that benefits from attention during the hiring process. Of course, interviews must assess the fundamental competencies needed in a chief of staff. In our case, we explored strategic planning, cross-

[1] Dan Ciampa, 'The Case for a Chief of Staff', *Harvard Business Review*, vol. 98, no. 3 (May–June 2020); Paul Kadzielski, 'Lessons in Chemistry: Being an Effective Chief of Staff', *The Chief of Staff* (December 2024); Laura Jacobs, 'Liaison, Delegates, and Advisors: An Examination of the Chief of Staff Role on College Campuses', *Journal of Research on the College President*, 4/1 (2020); Amy L Kristof-Brown, Ryan D Zimmerman and Eryn C Johnson, 'Consequences of Individuals' Fit at Work: A Meta-Analysis of Person–Job, Person–Organization, Person–Group, and Person–Supervisor Fit', *Personnel Psychology*, 58/2 (2005), 281–342.

collaboration, communication strategies, and operational systems building, all of which would be fundamental tasks for the role. But throughout those conversations we were each listening for something more: evidence of an overall orientation towards learning. For a CoS-dean pair building something new, both need to be ready to experiment, fail, learn, and adjust together.

> **'For a CoS-dean pair building something new, both need to be ready to experiment, fail, learn, and adjust together.'**

Snapshot of our learning in action: the interview process

Neither of us had done this before, and neither of us pretended otherwise. We were both, without naming it, assessing for comfort with steep learning curves and an uncertain context. What was our own readiness for such a context, and how could we each gauge the readiness of the other?

Heather had been intrigued by chief of staff roles in the past, but her response to those who asked if she might consider it was always the same: it depends on the person. This job description outlined an exciting combination of responsibilities, but she knew she needed to better understand Penny as a leader.

In her interviews with Penny and members of the team, Heather asked questions to gather information about how Penny worked and what she needed from the role. She got consistent signals of a thoughtful leader who placed a high priority on relationships, feedback and data, which were characteristics she was listening for. Similarly, Penny learned from Heather about her drive for process improvement, her appreciation for data-informed iteration, and her desire for values alignment. These particularly resonated because Penny's primary goal for adding a chief of staff was to ensure continued momentum of her strategic priorities, which can too easily take a back seat to the day-to-day management of a complex college. Penny recognised that hiring someone new to the role would add a layer of challenge and complexity but also envisioned real advantages in the opportunity for co-creation. While she acknowledged that hiring a seasoned chief of staff might mitigate risk at the outset, Penny ultimately felt that co-design held potential for a stronger fit for both the college and her leadership style. In the final steps of the process, we spoke frankly about the challenge ahead. We acknowledged it would take time and agreed that we would get plenty of things wrong. It felt like we were not only ready for the challenge, but also mutually excited about it.

Setting a shared vision: emergence as strategy

The more intensive design work begins when the chief of staff joins the team, building on the foundation established during hiring. For a new pair establishing a new role, a clear roadmap towards a specific goal is rarely realistic. Rather, the pair needs to gather information and data to construct the road-map together. This 'deliberately emergent strategy' is responsive to events as they unfold rather than being fully specified in advance (Mintzberg & Waters, 1985, p.263).[2]

In our context, emergence was not a haphazard, go-with-the-flow process. On the contrary, it was an intentional and disciplined one that allowed the role and the relationship to develop and evolve through experiment-ation and reflection. This approach is some-times called an umbrella strategy (Mintzberg & Waters, 1985). In our case, as dean and chief of staff, we agreed on the umbrella, defining the direction and boundaries within which we would experiment, independently and together, and that umbrella served as a shared reference for the ongoing iteration.

[2] Henry Mintzberg and James A. Waters, 'Of Strategies, Deliberate and Emergent', *Strategic Management Journal*, 6/3 (1985), pp. 257–272.

Snapshot of our learning in action: the first week

Heather started this new role in the last week of January 2025, which was the first week of a new federal presidential administration. The pace of change was rapid and the college community reported feeling stress and anxiety from the unknown. Penny's most immediate challenge was to increase internal communications during this period of significant institutional uncertainty. As a result, Heather jumped into the work much faster than planned.

We treated those first days as a chance to gather as much information as possible, knowing that we needed to quickly align on the things that would stay fixed, such as organisational values, priorities, and what the college needed from the chief of staff function.

At the same time, we were learning the more personal rhythms of how the other worked. It was improvisation with direction. Shadow days during the first week enabled Heather to observe values, habits and ways of being in action. In addition, a leadership team meeting was an early opportunity to define, together, the goals for that group and what the team needed from both of us.

To stay aligned and facilitate fast learning, we immediately instituted a daily check-in and committed to regular pauses for reflection. We refined the cadence and format of these early structures but used them throughout the design phase to recognise and formalise patterns that were working for us in the midst of a fast-paced semester. Mornings were best for ideation and clear thinking. Bullet points were better than scripts. Heather was best seen as a 'bridge,' not a 'gatekeeper.' These cycles of honest iteration also depended on candour, vulnerability and a shared willingness to say, 'this isn't working.'

Reflecting and learning: psychological safety in the dyad and beyond

Psychological safety, a shared belief that speaking honestly won't be punished, is a precondition for building a strong working relationship (Edmondson, 1999).[3] This is especially true for a pair that is learning in public. Edmondson and Bransby (2023) highlight availability, transparency, and a willingness to actively seek out constructive feedback, as key leadership characteristics that drive both learning and performance.[4] In our case, we were constantly asking each other what was working and what wasn't, and treating the answers as critical data and insight rather than failure.

That strong foundation of psychological safety within the dyad is powerful, but it does not automatically transfer to the leadership team and the broader college community. A leader's supportive, coaching-oriented, non-defensive behaviour is a clear predictor of whether a team comes to see itself as belonging to a safe environment (Edmondson, 1999), indicating that the transfer must be actively built.

Part of the early work of both the dean and the chief of staff, then, is to recognise and create opportunities for feedback and to take visible risks in front of others. When Penny charged Heather with facilitating a leadership team meeting in her second week, it was a chance to signal support, invite challenge, and build trust with the group. Transparency and care were anchors of the meeting, as they were for the nascent partnership, and we were modelling the kind of feedback and learning loop we hoped to build more widely.

> **'A leader's supportive, coaching-oriented, non-defensive behaviour is a clear predictor of whether a team comes to see itself as belonging to a safe environment...'**

[3] Amy Edmondson, 'Psychological Safety and Learning Behavior in Work Teams', *Administrative Science Quarterly*, 44/2 (1999), 350–383.
[4] Amy C Edmondson and D P Bransby, 'Psychological Safety Comes of Age: Observed Themes in an Established Literature', *Annual Review of Organizational Psychology and Organizational Behavior*, 10 (2023), 55–78.

Snapshot of our learning in action: the pauses

We immediately incorporated structured protocols to step back from the work and reflect on our partnership.

At the end of the first week, we sat down for a simple plus-delta reflection, inviting each other to name what was and was not working. Our notes capture appreciation for things that were going well like 'knowing there's time on the calendar that can accommodate different kinds of conversations enables me to exhale' and 'level of laughter.'

We also highlighted things we wanted to adjust like 'being ready to focus our time together' and 'don't take time to share context during shadowing meetings.' Quick check-ins like that, putting the work tasks aside for a moment to focus on what we were learning and what we needed to be successful in our respective roles, were critical to making adjustments in real time.

At the end of our first semester together, we used an extended walking meeting to work through a set of prompts designed to surface observations, goals and hopes. 'What's been most useful to you? What can I be doing more of, less of, or differently to better support you and the college? What are you proud of? What kind of feedback is most useful? What do you want to work on this year in terms of your leadership?'

Across these conversations, we were attending to our individual needs as well as the needs of the dyad, the leadership team and the college more broadly. They also helped us demonstrate a real desire for honest assessment in service of the important work we were doing together.

Beyond a single professional school

Our experience is one case, in one professional school, at one university. But the conditions that made these three components effective were not specific to our college or a college of education.

While the scale and shape of the components differ across settings, a provost creating their first chief of staff role faces the same two overarching design questions, as would any other leader from the various academic or functional units in a college or university. Heightened power dynamics, compressed schedules, or higher stakes necessarily impact the design process. They require adaptable structures to fit the individuals and the context. But at the end of the day, any institution facing uncertainty—which is to say any institution—can hire for a learning orientation, agree early on the fixed points, and build reflection into the rhythm of the work rather than leaving it to chance.

> **'Any institution facing uncertainty can hire for a learning orientation, agree early on the fixed points, and build reflection into the rhythm of the work rather than leaving it to chance.'**

When we began this work, we imagined the more pressing question to be the tactical one: what is the role of a chief of staff? Nine months later, we found that the answer was hardly profound. The role must be what the partnership and the institution need it to be and evolve over time to meet those changing needs. When Heather arrived in January 2025, Penny was navigating rapid change and uncertainty, with a high demand for fast and careful communications, nimble problem solving, and thoughtful attention to the needs of the college community. In Penny's early words, Heather added a powerful 'motor to her boat', helping her lead with more speed, agility and range. The waters shifted and new obstacles emerged, and we adjusted accordingly.

The question that actually determined our success was the second: how we would

build it together. Our chief of staff role was stronger for having been co-authored, rather than designed in advance and handed over. We suspect the same is true of most things worth building in a university, which is why we would encourage any principal considering the role to spend less time perfecting the job description and more time finding the person with whom they are ready to design and learn.

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Three strategies for creating the chief of staff role together

1. Prioritise learning orientation during hiring

When building a new role, the interview process should look beyond technical competencies to assess a candidate's readiness to experiment, fail, learn and adjust alongside their partner.

2. Adopt an emergent strategy

Instead of relying on a rigid, pre-defined roadmap, use an emergent strategy. Establish a shared vision and fixed boundaries and allow the specific duties of the role to evolve through ongoing experimentation, observation, and reflection.

3. Build intentional structures for reflection

Success depends on creating specific, regular opportunities for honest feedback and reflection, such as daily check-ins and plus-delta reflections. This fosters the psychological safety necessary to navigate uncertainty and iterate on the partnership in 'real time'.

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The ‘speed of trust’:

Clarifying action as the chief of staff

Katelynn Miller



The ‘speed of trust’

Katelynn Miller

In the office of the provost, the ‘Define. Align. Refine.’ framework enables the chief of staff to deliver long-lasting results.

During our first conversation, my notebook was filled with questions for the provost. I expected to need a great deal of information before I could confidently commit to a chief of staff role. In the end, I needed only one answer.

'What was the most rewarding part of serving as provost?'

'By the time an issue reaches a provost, many thoughtful, intelligent and committed people have already tried to solve it. The work is rarely about having the best idea. It is about helping the institution move forward when good ideas, competing priorities and legitimate differences of perspective meet.'

That answer has stayed with me since that day. It has shaped how I approach my role as chief of staff more than anything else I heard in the interview process.

A chief of staff to a provost holds an unusual vantage point. The provost's office sits where academic vision, institutional governance, faculty leadership, and university operations converge. It means living at the epicentre of great ideas, good intentions, and perspectives spanning academic disciplines, administrative divisions and community voices. The role requires constantly moving between strategy, execution, long-term priorities, and the realities of today's decisions. Few roles offer visibility across so many corners of the university.

Faculty members often experience decisions through the lens of instructional experience, academic quality and disciplinary expertise. Administrative partners must balance operational realities, financial constraints, regulatory requirements and implementation. All must consider long-term strategy alongside immediate needs. The American Association of University Professors, together with the American Council on Education and Association of Governing Boards of Universities and Colleges, describes academic governance as a joint effort in which the weight of each voice should reflect its responsibility for the matter at hand.[1] Differences in the weight of each group's voice on a particular issue should be determined by the extent of its responsibility and expertise on that issue. Striking the right balance between meaningful collaboration and asserting appropriate decision-making authority requires discipline, humility and deep mutual respect as custodians of the university’s mission. From my vantage point as chief of staff, each perspective is inimitable. None can successfully implement institutional change alone.

There is something distinctly human about higher education. Our institutions are built upon relationships—sharing knowledge, wisdom, lived experience and growth. Collaboration is not simply how universities function: it is part of our identity. Yet in

[1] American Association of University Professors, American Council on Education, and Association of Governing Boards of Universities and Colleges, ‘Statement on Government of Colleges and Universities’ (1966), American Association of University Professors.

communities rich with extraordinary expertise and grounded in traditions of shared governance and collaboration, the very complexity we value often creates noise. We observe proposed solutions moving forward when the problem has been assumed rather than collectively defined. We work in silos, often duplicating effort. External questions from government agencies, lawmakers, media and community partners introduce new perspectives and pressures that can further complicate how a problem is understood. But the challenge is not that there are too many voices. Rather, it is that without clarity around purpose, process and decision-making, those voices struggle to become coordinated action.

As chief of staff to a provost, I have found that my greatest contribution is not solving problems myself. Instead, it is creating the conditions so that the right people can solve them together. Much of that work happens before formal decisions are ever made—clarifying ownership and decision-making authority, identifying whose experience and perspectives are needed, sequencing conversations, surfacing hidden assumptions, and creating the conditions under which governance can function effectively rather than procedurally.

That work has emerged from repeated practice into a simple framework: Define. Align. Refine.

Define

Most organisational challenges are solutions in disguise. A request for a new policy. A proposal to implement a new system. A revised process. An email announcing the answer before anyone has asked the question. These unilateral requests often fail because without sufficient collaboration, we have not yet elucidated the problem. Defining the issue creates the shared starting point before people, time, and institutional energy are invested in solving it.

Here, we might ask:

- What is the problem?
- What decision needs to be made?
- Who has the authority to make it?
- Who should help shape the outcome?
- What information is missing?
- What does success look like?

Defining is often the most intellectually demanding part of the work because the presenting symptom is not the same as the underlying problem. In a large organisation like a university, members of the community experience the institution from very different vantage points, shaped by their roles, responsibilities, expertise and the parts of the student journey they steward. What is coherent, familiar or well understood in one area, may be foreign in another because the scope of work is different.

The chief of staff must see across these perspectives without becoming captive to them, instead using the core mission to orient understanding of institutional needs. Karl Weick's work on organisational sensemaking argues that organisations act based on the meanings they collectively construct rather than simply the information available to them.[2] It describes how people navigate ambiguity and develop plausible understandings of the situations encountered.

Defining the problem is, in many ways, an exercise in institutional sensemaking. It requires continually connecting perspectives, testing assumptions, and incorporating what we learn through action to sharpen our understanding of the problem in relation to our shared mission.

> **'Identifying whose experience and perspectives are needed, sequencing conversations, surfacing hidden assumptions [create] the conditions under which governance can function effectively rather than procedurally.'**

[2] Karl E. Weick, *Sensemaking in Organizations* (Thousand Oaks, CA: Sage Publications, 1995).

In the provost's office, every question carries a governance dimension. Is this a faculty decision? An administrative decision? A matter for shared governance? A regulatory requirement? Or simply an operational process that has evolved through habit? Clarifying those distinctions prevents institutions from solving the wrong problem or engaging the wrong parties. This discipline also feels familiar in an academic environment—leaning on aspects of free inquiry, evidence-based and data-informed decision making, and thoughtful assessment.

Requests often arrive accompanied by proposed solutions, compressed timelines, and the expectation that action is needed immediately. Defining creates space to determine whether the institution is solving the right problem before investing time and political capital in the wrong one. Ironically, solving the right problem is often quicker than coping with the consequences of an incomplete solution.

Defining also allows the provost to focus on decisions that genuinely require executive judgement while empowering others to resolve operational questions at the appropriate level.

I saw the impact of defining the true problem most clearly while collaborating with a working group of academic administrators to identify opportunities to improve institutional processes and communication. We began with a familiar assumption: communication was a problem.

Participants described inconsistent messaging, duplicated effort and uncertainty about where to find information. As chief of staff, I had the latitude to test that assumption and push us to address the institutional-level challenge, rather than defending an existing institutional habit or proposed solution.

It would have been easy to conclude that we simply needed to communicate more. As we worked to define the problem,

'Defining creates space to determine whether the institution is solving the right problem before investing time and political capital in the wrong one.'

however, a different pattern emerged. Information was rarely absent. Rather, administrators were creating context to help others understand how decisions, processes, and initiatives connected across schools and administrative units. What initially appeared to be a communication gap was, in fact, a contextualisation gap. It took several rounds of discussion to move beyond the visible symptoms and articulate the systemic problem beneath them.

That distinction fundamentally changed our approach. We focused on creating greater clarity by improving how information was connected, contextualised, and shared across institutional systems. Rather than producing another communications plan, we began documenting institutional processes, clarifying ownership, mapping decision pathways, answering frequently asked questions, and helping administrators understand how individual responsibilities connected to broader institutional policies and goals. We designed a single homepage as a point of entry into the existing knowledge systems, providing the ability to navigate easily and provide context based on audience needs. Accurately defining the problem revealed the need for better infrastructure to create shared understanding—not simply more information.

Higher education distributes expertise intentionally. Few people possess the entire picture, and no single office should claim absolute knowledge in a landscape of shared governance. Defining the problem therefore requires identifying not only what is missing from the process, but what is missing between people, systems, and governance structures. Often, what is absent is more consequential than what is visible.

Align

Alignment is frequently misunderstood as consensus. In my experience, it is something different. Consensus asks everyone to agree. Alignment asks for shared understanding of purpose, process, roles, and constraints to move forward together, even when thoughtful disagreement remains. This is where the chief of staff's work becomes largely invisible.

Much of this work happens outside formal meetings. It involves sequencing conversations, recognising who needs space to voice concerns privately before speaking publicly, translating between academic and administrative perspectives, finding a shared language, and helping the provost and leadership team understand not only what people think, but why they think it. It is less about persuasion and more about creating enough trust so that people are willing to engage honestly with difficult decisions. It requires understanding not just organisational charts, but organisational dynamics. We should ask:

- Who has influence here?
- Which concerns remain silently held?
- What institutional memory shapes today's reactions?
- Whose voices are missing from this conversation?
- Who needs to explain this decision to others?

Alignment often requires the most significant time investment. This is where chiefs of staff work at the speed of trust, not project plans or implementation timelines. It's understanding who is there, how they see the problem, and integrating their perspectives into a shared narrative. It also requires identifying champions who can help carry change forward in ways that executive leadership alone never could.

In the provost's office, alignment rarely means bringing everyone into the same meeting. More often, it means engaging the right people at the right stage. Faculty leaders, department chairs, academic deans, governance committees, professional staff, cabinet colleagues and operational partners each have different responsibilities and different perspectives. Effective alignment respects those roles instead of flattening them. While the provost provides institutional vision and executive leadership, the chief of staff surfaces competing perspectives, identifies emerging concerns, and ensures decisions are communicated and implemented in ways that cultivate trust and confidence that the process has been fair.

> **'Alignment often requires the most significant time investment. This is where chiefs of staff work at the speed of trust, not project plans or implementation timelines.'**

Alignment work also extends beyond projects. It is about the people that make up the institution.

One of the unique privileges of serving in the provost's office is seeing talented people across the institution whose leadership potential extends well beyond their current responsibilities. Professional staff and administrators, in particular, possess remarkable institutional knowledge, yet rarely have structured opportunities to develop as leaders. Helping create those opportunities through mentorship, projects aligned with their professional goals, or cross-functional initiatives is itself an act of alignment. Institutions become more agile when people not only understand their current roles, but how they will advance the broader mission now and in the future.

Refine

Decisions are not the end of organisational learning. They are the beginning. Institutions function better when they establish mechanisms to learn from implementation, refine processes and incorporate new

information without reopening every decision from the beginning. Refinement builds institutional memory while preserving trust in the decision-making process.

For a chief of staff, refinement means building systems that improve over time rather than merely completing individual projects. It means creating feedback loops, documenting lessons learned, celebrating progress, and helping teams understand that iteration is responsible stewardship. It also means reminding people where they are in the change process. Organisational change can feel slow from inside the work. Recognising milestones and making the progress already achieved visible helps sustain momentum.

One of the clearest examples of refinement in my work came through developing the operational infrastructure for a new academic initiative that required the university to build an entirely new operating model. Launching the programme was never simply an academic exercise. It required creating the legal, financial, human resources, operational, and academic frameworks necessary to support students.

Existing processes assumed students, faculty, payroll, housing, and academic operations all occurred within a single geographic context, requiring administrative units across the institution to challenge long-standing assumptions and develop new ways of working together. Creating a new model required dozens of decisions, revealed new operational questions, and required continuous collaboration among academic leaders and administrative partners.

The initial launch was only the beginning. Over the next three years, we continually refined both the administrative infrastructure and the academic model as implementation revealed new opportunities and challenges. Each iteration strengthened the programme, clarified administrative responsibilities, informed future decisions, and moved us closer to a sustainable operating structure. Throughout the process, maintaining alignment required continually reaffirming why the work mattered to students and the institution, even when the changes created additional work or disrupted familiar processes. Progress depended on sustained collaboration among cabinet leadership, the president, the provost, academic deans, faculty, and professional staff, each contributing a distinct perspective to a shared institutional goal.

That experience reinforced for me that refinement is not about perfecting a plan before implementation. It is about designing organisations that are actively learning while acting. Large-scale institutional change is rarely successful because the first solution is right. It succeeds because people are willing to test assumptions, learn from experience, and continuously improve the systems that support the work. For a chief of staff, creating the conditions for that kind of organisational learning is just as important as helping launch the initiative itself.

Conclusion

Higher education today is navigating extraordinary volatility. Demographic shifts, financial pressures, technological disruption, changing expectations from students, and increasing public scrutiny require institutions to become more responsive than ever before.

Yet responsiveness should not come at the expense of the collaborative values that define our institutions. The challenge is not choosing between shared governance and agility. The challenge is creating enough clarity that shared governance becomes a catalyst for thoughtful action rather than a source of unnecessary friction.

The ‘Define. Align. Refine.’ framework emerged from practice. Again and again, progress accelerated when we clarified the challenge before debating solutions, aligned stakeholders around a shared understanding



of purpose, and refined processes as implementation revealed new information.

While presented sequentially, the actions to define, align and refine are rarely linear. They are a habit of leadership. Effective chiefs of staff move fluidly among these leadership modes and inspire those around them to seek clarity.

Universities have never lacked intelligent people or thoughtful ideas. What they sometimes lack is enough clarity to connect those ideas to action.

From my seat in the provost's office, I have found that the chief of staff's greatest contribution is not solving every problem, nor reducing complexity by eliminating perspectives. It is helping the institution define what matters, align the people who will carry the work forward, and refine the systems that allow thoughtful decisions to become lasting institutional capacity.

'The actions to define, align, and refine are rarely linear. They are a habit of leadership. Effective chiefs of staff move fluidly among these leadership modes and inspire those around them to seek clarity.'

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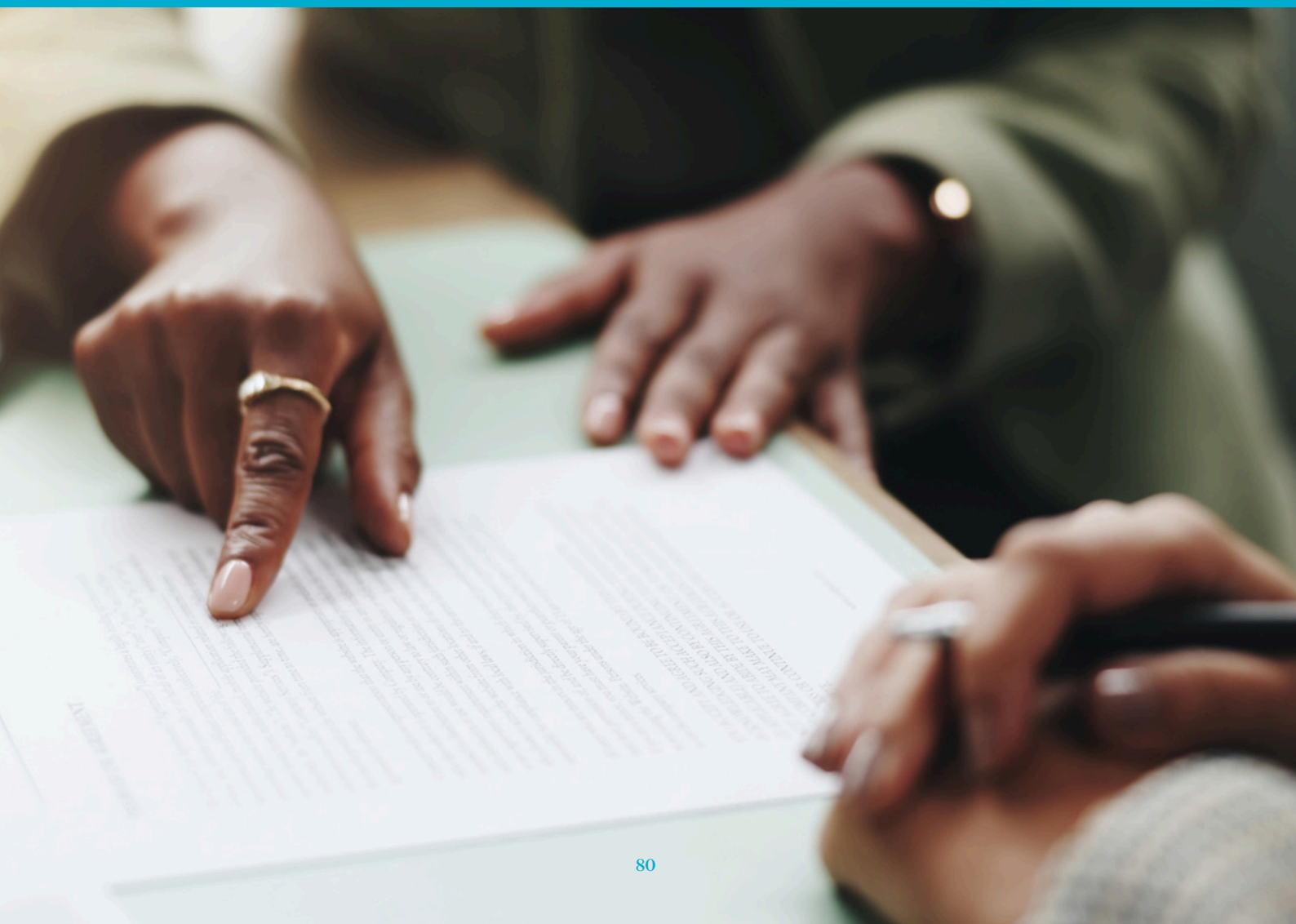
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Proximity is not authority:

The chief of staff's borrowed power in higher education

Rolanda C. Burney



Proximity is not authority

Rolanda C. Burney

Why the skilful cultivation of informal power is the higher education chief of staff's greatest resource for success.

The paradox at the heart of the role

When people ask me for advice about being a chief of staff, among the many things I share with them is this: distinguish your voice from that of your principal.

Titles carry weight. As chiefs of staff, whether we acknowledge it or not, people assume that when we enter a room we speak on behalf of our principal. This is not the role, and the assumption can be misleading, for us and for the community we serve.

Here is the paradox at the heart of our role: as chiefs of staff we sit beside the principal, shape agendas, hold privileged information and influence decisions, but hold no formal mandate to direct others. Our principal's formal power and authority is not ours. What authority we do have derives, instead, from the deliberate, skilful cultivation of informal power.

Understanding this distinction may be the single most important factor in our success. If we mistake our proximity to formal power as our own or assume we speak for our principal—adopting a 'the chancellor said' approach—we will falter. But when we lean on our own voice and relationships, we can succeed.

To make this case, in this article I draw on three different kinds of evidence. First, a foundational theory of social power that allows us to discern exactly what power base is beneficial for a chief of staff and what one isn't. Second, a set of historical chiefs of staff whose fortunes turned on the power base they operated from. And third, my own experience across public and private higher education (HE), where not operating within the correct power base would have been detrimental for the wider college community.

French and Raven: a seminal framework

Looking at a hierarchy in an organisational chart, it is reasonable to assume that the box immediately next to the CEO or principal carries similar weight in importance, impact, authority, power and influence. This, however, is a visual fiction.

French and Raven, in 'The Bases of Social Power' (1959), identify five distinct ways one person can change another's behaviour, beliefs or attitudes.[1] The five bases are:

- **Reward:** A colleague's perception that we can grant them something they want, such as a bonus, praise or time off.
- **Coercive:** A colleague's perception that we can withhold something they want, or impose something they don't, such as a poor review or exclusion from a project.

[1] John R. P. French and Bertram Raven, 'The Bases of Social Power', in *Studies in Social Power*, ed. Dorwin Cartwright (Ann Arbor: Institute for Social Research, 1959), pp. 150–167.

- **Legitimate:** A colleague's perception that we have the right to direct their behaviour, simply by virtue of our position.
- **Referent:** A colleague's sense that we are likeable, trustworthy or someone they want to be associated with.
- **Expert:** A colleague's perception that we hold special knowledge or skills.

These five bases belong to two overarching modes: formal and informal. Reward, coercive, and legitimate power are all formal. They come with the job title. People listen because one's title says they should: 'I'm the manager, so this is my call.' Legitimate power best represents this mode. It is the simple right to direct because of one's position. Reward and coercive power work in a similar way but through different levers, the first through what can be granted, the second through what can be withheld. Of the three, coercive power is the most consistently negative in its effects. These power bases and formal power are fundamentally contingent on the job title. Lose the title and the powers disappear.

Referent and expert power, by contrast, don't come with a title at all. They can both be held with zero direct reports and no line on an organisational chart. Referent power is earned through likeability, trust and reputation built over time. Expert power belongs to whoever knows the subject, regardless of where they sit in the hierarchy. A faculty senate, for example, extends and withholds precisely this power. A senate does not answer to legitimate power: a memo from the chancellor's office carries little weight in a vote. But it will follow someone who has earned its trust, or who is recognised for genuinely knowing the material under debate.

In a later iteration of their work, Raven added a sixth base, now widely recognised as informational power, the power held by gatekeepers.[2] Informational power exists on its own terms, independent of who delivers it. A chief of staff, for example, might hold expert power because people trust their judgement, and informational power because they happen to have a fact or a briefing the room needs in that moment. The two are often used together. In a study of college and university presidential assistants, a role with little or no line authority—much like the chief of staff—personal appeal was almost never used. Instead, rational persuasion, a tactic that draws on both expert and informational power, was the dominant mode of lateral influence, used more than two-thirds of the time.[3]

But expert and informational power are not the same. Informational power is more fragile: the moment the information is questioned, it can be undermined, regardless of the messenger's credibility.

Formal power rests with the CEO or principal, not with the chief of staff. Our role sits almost entirely in the informal category, saturated with informational power by virtue of what we see and hear. This is not a limitation. It is the nature of the role that its effectiveness rests on how well it leverages likeability, trust, reputation, situational access and information.

> **'It is the nature of the [chief of staff] role that its effectiveness rests on how well it leverages likeability, trust, reputation, situational access and information.'**

[2] Bertram Raven, 'Social Influence and Power', in *Current Studies in Social Psychology*, ed. I. D. Steiner and M. Fishbein (New York: Holt, 1965), pp. 371–382.
[3] Michael A. Sass, 'Presidential Assistants in Higher Education and Their Use of Power, Authority and Influence' (PhD diss., University at Albany, State University of New York, 2016), pp. 139–140.

Overreach and underreach: when proximity becomes a problem

Overreaching the boundaries of power, formal or informal, weakens it, but the failures differ. French and Raven note that exerting expert power beyond its domain tends to reduce that power, undermining the influencer's credibility. Informal overreach exposes the limits of that expertise or the relationship dynamic that the influence was built upon. Formal overreach works the other way: proximity or authority used past its legitimate range costs more than it gains, and the costs tend to surface fast.

Misjudging power can run in either direction, as the following examples from Chris Whipple's *The Gatekeepers* (2017) indicate.[4] As Chief of Staff to President Jimmy Carter from 1979 to 1980, Hamilton Jordan's failure was one of underreach: he resisted formalising his authority and let an undisciplined West Wing culture create the appearance of drift and favouritism. Donald Regan and John H. Sununu erred the other way. Regan was Chief of Staff to President Ronald Reagan (from 1985 to 1987) and acted with decision-making authority that was never his. Sununu, Chief of Staff to George H. W. Bush from 1989 to 1991, wielded a pit-bull leadership style, misusing the perquisites of office until he had alienated Cabinet, Congress and President Bush's family, forcing his resignation.

This same overreach plays out constantly in higher education, just at a smaller, more human scale. A student misses a deadline, an enrolment deposit, a housing assignment, a graduation application, and asks for an exception. Rather than own that decision, a staff member tells the student that 'the chancellor said no extensions can be made.' The chancellor was never consulted. The office invoked formal authority they don't hold—borrowed from a principal who issued no such directive—to avoid a decision that

'Underreach and overreach aren't the only options available to chiefs of staff. Some define the role by mastering informal and informational power outright.'

was theirs to make within their own process, procedure and rules. The chancellor manages the institution. The office owns the exceptions it's authorised to grant or deny. When that office redirects responsibility upward instead of exercising the authority it actually has, it doesn't just mislead the student in front of them. It also erodes trust in both the office and its leadership, and it leaves the chancellor's name attached to a decision they never made. It's the same failure as Regan and Sununu, just closer to home, and it raises the question of what the alternative looks like.

Underreach and overreach aren't the only options available to chiefs of staff. Some define the role by mastering informal and informational power outright. Louis-Alexandre Berthier, Napoleon's chief of staff from 1796 to 1814, is perhaps the most noted historical case. Berthier held no command authority to speak of. By most accounts he was an unremarkable battlefield general, and when occasionally given independent command, he faltered and turned to Napoleon for direction. His power was of an entirely different kind. The Grande Armée was the first army in history to spread its operations across hundreds, and later thousands, of square miles of territory, and running a force at that scale demanded a two-way flow of information more complex than anything previously attempted.[5]

Managing that flow was Berthier's job: collecting the daily reports arriving from the corps, supplying Napoleon's staff with everything it needed to know about the army's position and strength, and turning the emperor's rapid, often garbled dictation into orders the army could execute. Napoleon called him his 'walking situation report.'[6]

[4] Chris Whipple, *The Gatekeepers: How the White House Chiefs of Staff Define Every Presidency* (New York: Crown, 2017).
[5] Martin van Creveld, *Command in War* (Cambridge, MA: Harvard University Press, 1985), p. 70.
[6] van Creveld, p. 70.

Soldiers nicknamed him the emperor's wife. Both capture the same truth: Berthier's influence was total, and it ran entirely through information, process, and proximity, never through command.

That dependence cuts both ways. When Berthier was absent during the Waterloo campaign, the system he had spent 18 years building collapsed without him, a failure that led directly to Napoleon's defeat.[7] Even Napoleon's own tribute carried this warning inside it: he called Berthier 'a goose that I have turned into an eagle of sorts.'[8]

Informational power, unlike expertise built independently, only lasts as long as the access and proximity that sustain it. The same is true of a chief of staff whose standing rests on being the person who knows what's happening across a campus: the moment that access closes, so does the influence built on it.

The same instinct shows up much closer to home. I once had an interview where the president was described as decisive, with a hands-off management style, focused on raising money and running this gigantic enterprise: the university. The type of chief of staff this president needed was one who, as a foil to the president's policy-making role, keeps the trains on time, keeps everyone compliant with policy, mediates disputes, sets agendas and ensures the president's vision is actualised. In that moment I said out loud: 'The way you're describing this sounds like a Jim Baker chief of staff. Reagan's first chief of staff.'

In *The Gatekeepers*, Whipple writes that 'Baker took the operational lane—managing the president's schedule, legislative strategy and relations with Congress, the press and the executive branch…' and that, 'As chief of staff, Baker had been emphatic: "the most important word in the title is staff."'[9] Baker is my favourite, and aspirational, chief of staff. I've tried to practise his model every day—not managing the president's calendar and legislative strategy specifically, but the same operational instinct: run the machinery, don't compete with it for the spotlight.

Jordan, Regan and Sununu show what happens when a chief of staff misjudges the nature of their power, whether by underusing it or overreaching. Berthier shows the alternative: influence built entirely through earned, not borrowed influence. But what happens when the role hands you formal power outright? This question frequently plays out on a far smaller stage than Napoleon's headquarters or the West Wing, including in my own.

Higher education

Twice in my career I've been asked to step into senior operational leadership positions.

During one of these terms—in a position with direct oversight of staff, and a mandate to support a chancellor—our campus faced two serious incidents that had to be managed simultaneously. Early one day, we discovered hate-based vandalism impacting a religious community. We spent most of the afternoon managing that response, working with student affairs, the police department, university relations and a faith leader. Later that evening, we learned of an unrelated student fatality particularly affecting our Black student community. The triage team came primarily from student affairs.

The competing pressures responding to these crises were about more than messaging and public statements; they were also about capacity. Our crisis response staff, the chancellor's attention, and my time, were all stretched thin. Some members of our leadership team wanted to pull student affairs away from responding to the student's death to focus on the religious attack. Without meaning to, this would have pitted the welfare

[7] van Creveld, p. 71.
[8] ibid.
[9] Whipple, p. 135.

of one student community against that of another, creating the perception that one group's emotional and intellectual trauma took priority over another's.

As I held a senior leadership position, and with a nod to my chief of staff instincts, I felt responsible for naming this dynamic and pressing the chancellor to give both situations the careful, proportionate attention each deserved. At that moment I was holding both kinds of power at once: I had to manage the tension between my formal mandate—allocating staff resources to address an immediate crisis—and my informal, strategic mandate: advising the chancellor on how to balance proportionate attention across multiple concurrent emergencies.

Triage isn't about what is important in the abstract. It is about what needs resources right now versus what can wait for two hours. The vandalism was serious, and it was addressed, but we could not delay addressing the urgent human needs that came about from the student's death.

Here is the distinction I keep returning to. A senior administrator owns a domain: they're the expert in their function and they lead from that expertise. A chief of staff owns the whole picture on behalf of the principal. The job isn't to be the expert in any one thing: it's to be the person who sees across everything, knows what needs to move, knows what the principal needs to hear versus what they don't, and makes sure nothing falls through the cracks between domains. Because the chief of staff's authority is borrowed, their judgement about when and how to use it must be impeccable.

> **'Because the chief of staff's authority is borrowed, their judgement about when and how to use it must be impeccable.'**

Where the stakes are sharpest

I've provided a glimpse of stakeholder dynamics in the example above. Now I want to widen the lens across the sector, because in higher education the distinction between borrowed and formal power shows up in almost every relationship a chief of staff holds, with trustees, faculty, staff and the president.

I have had the privilege of working across a diverse range of institutions and associations, public and private: Historically Black Colleges and Universities (HBCUs), Predominantly White Institutions (PWIs), and research-intensive and comprehensive institutions. Whatever their differences in size or mission, two elements remain constant: the distinctive governance structure of higher education (built on academic senates, faculty autonomy and collegial decision-making) and a culture in which expertise, not hierarchy, signals legitimacy. In this environment, directives do not land: persuasion is required. This is where chiefs of staff who understand how to leverage informal and informational power excel. They understand that relying on proximity to authority breeds resistance, suspicion or simply gets them ignored. Instead, they cultivate trust, project confidence, stay institutionally astute and, most importantly, build genuine relationships.

As Dan Ciampa observes in the *Harvard Business Review* (2020), trust between an executive and their chief of staff is the foundation on which all other effectiveness rests.[10] In higher education, that foundation extends outward: to trustees, to faculty and to staff—none of whom answer to the chief of staff's authority, and all of whom extend trust only once it has been earned rather than assumed. My president at a small private college, who had previously been a chief of staff, once told me that my responsibility as liaison to the board of trustees was to make myself indispensable to the board chair. I needed to cultivate that relationship so the chair could trust that, in the face of conflict,

[10] Dan Ciampa, 'The Case for a Chief of Staff,' *Harvard Business Review*, May–June 2020.

my priority would align with the institution's best interests. Initially this felt like a conflict of loyalty. I felt challenged. My principal was my strategic partner, and building a close relationship with the board chair felt like a risk in dividing my loyalty. I grew to understand that the knowledge I held, drawn from the relationships I'd built with my principal, our cabinet, faculty, students, and staff, could help the board chair better manage the board and support my principal. I did not need to violate any of those constituents' confidences to do that. I simply needed to convey themes and share information in a way that informed conversations and supported good decisions. Being a good listener, at times something closer to a counsellor, and being upfront about my intentions, gave my colleagues the confidence to trust me. I brought that same approach to every situation, functioning as interpreter and 'whisperer' to help people work together more effectively. It mattered to me that people understood that to help them, I might draw on what they shared with me—without betraying their confidence. All of this built my credibility and none of it depended on my principal's authority.

This same principle—that credibility is built through discretion and trust, not conferred by proximity to my principal—played out just as clearly within my own leadership team. On one occasion, a member of that team confided in me that they were a candidate for a job they really wanted and would likely get. They hadn't yet told my principal and were debating when that conversation should happen. Their relationship with our principal went beyond mentorship: it was, in my view, familial. I told my colleague that, out of respect for that relationship, our principal deserved to be told in time to support this colleague, advise them, and grieve their loss from the team.

> **'Borrowed authority does not fail quietly in this environment; it fails visibly and often publicly, in the very rooms where a chief of staff most needs credibility.'**

I also knew the institution would need lead time of its own, to prepare for the departure and begin planning for the role. I advised my colleague to have that conversation soon and told them plainly that I would raise it with our principal myself if they didn't. I was upfront that I'd prefer they control the message, but that I wasn't willing to let the institution be caught without notice. None of this—the board chair's confidence, my colleague's trust, the countless conversations in between—had anything to do with my principal's title, or my own. It was built relationship by relationship, disclosure by disclosure, through demonstrated judgement rather than borrowed authority. In a higher education setting, where faculty answer to conscience and academic freedom rather than to a chief of staff's chain of command, this distinction is not a nicety. It is the difference between a chief of staff who is trusted and one who is merely tolerated. Borrowed authority does not fail quietly in this environment; it fails visibly and often publicly, in the very rooms where a chief of staff most needs credibility.

Conclusion

I began this article with a paradox: the chief of staff who looks like they hold power rarely does, and the one who holds it is rarely the one who looks like it. The resolution to that paradox is not a title, a chart position, or a seat next to the principal. It is the deliberate, ongoing work of earning trust, building credibility, and knowing precisely what the room in front of you needs.

My own experience has played out on a far smaller stage than the West Wing or Napoleon's headquarters—in crisis rooms and a difficult conversation with a colleague—but the lesson is the same at each scale. Our power, though borrowed, is real: lent to us by relationship and expertise rather than granted by title. In these roles, trust isn't transferable, and there is no institutional memory of yesterday's effort. Every room meets us for the first time, no matter how much credibility we earned in the last one.

That is the crux of the advice I offer my chief of staff colleagues. Proximity will get you in the room, but it will not make anyone listen to you once you're there: to be successful, leverage the fluidity of your access to informal and informational power.

> **'Every room meets us for the first time, no matter how much credibility we earned in the last one.'**

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