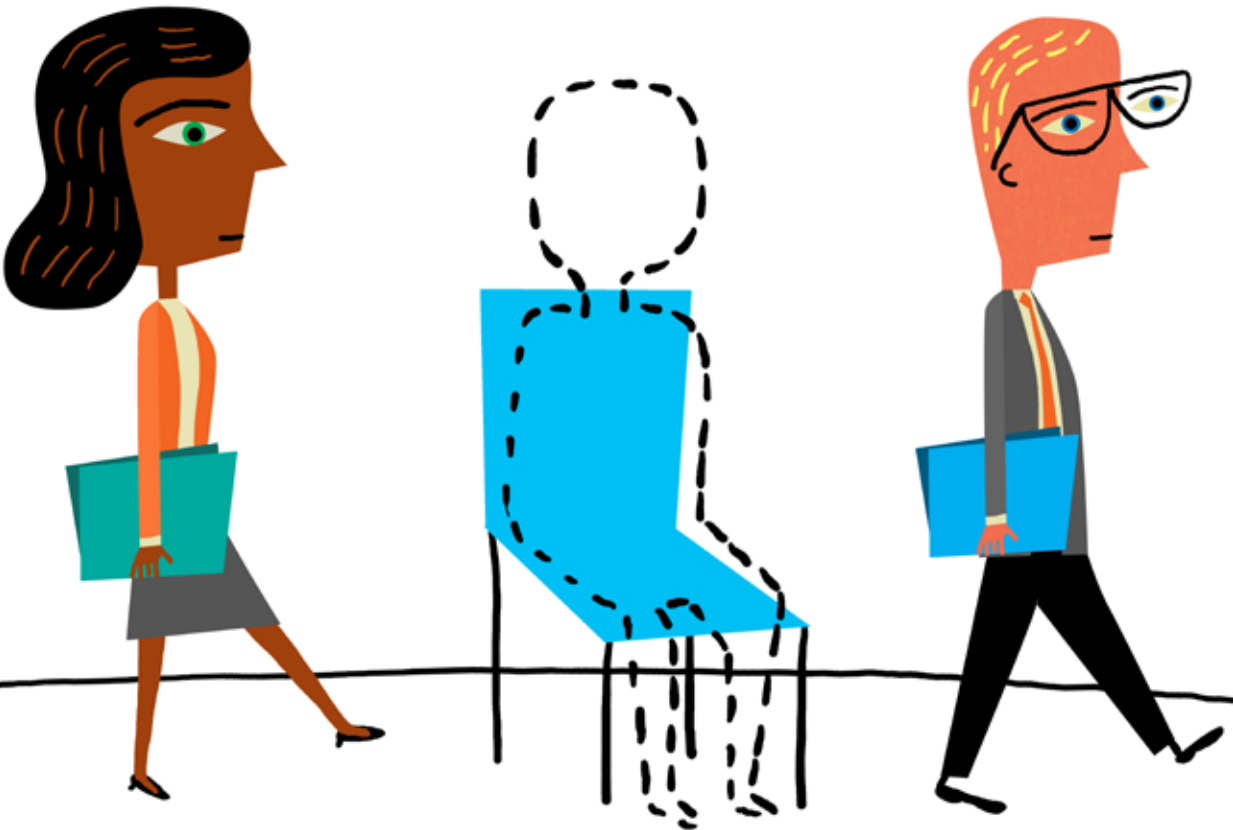




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Surviving and Thriving as an Interim or Acting Leader



AAMC Successful Medical School Department Chair Series

Association of
American Medical Colleges

AAMC Successful Medical School Department Chair Series

Surviving and Thriving as an Interim or Acting Leader

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AAMC

Association of American Medical Colleges
Washington, D.C.

This is a publication of the Association of American Medical Colleges. The AAMC serves and leads the academic medicine community to improve the health of all. aamc.org

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Preface

The rate of turnover in the health care industry is rising. According to B.E. Smith (2017), a health care executive search firm, the rate of turnover for health care employers has been averaging 19% in recent years.

The trends found in health care overall are also reflected in academic medicine, especially among department chairs. Rayburn et al. (2009) reviewed 29 years of AAMC faculty data and found that medical schools and teaching hospitals are experiencing increasingly frequent turnover of department chairs.

The naming of an interim leader is a common response to leadership turnover in academic medicine (Grigsby et al. 2009). The AAMC Faculty Roster trend reports on department chairs and medical school deans show the percentage that are interim and acting department chairs and deans to be around 9% from 2015 to 2018 (AAMC 2018).

While interim and acting leadership is quite common, very little, if any, guidance exists to help someone tapped for these positions. If asked to step into temporary leadership, should you accept the position? And, if you do, how can you set yourself up for success?

To answer these questions, the AAMC interviewed 10 leaders who served in an interim or acting capacity across the mission areas of academic medicine. Leaders who served in an interim capacity at the AAMC were also interviewed. A literature review was conducted, and although the available literature was scarce, it reflected the experiences of the leaders interviewed. This guide, and the tools that accompany it, is the culmination of the literature review and interviews. These resources will help anyone at a medical school or teaching hospital decide whether to take an interim or acting position and will provide tips on how best to negotiate terms and conditions that will allow for success if the position is taken.

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INTERVIEWS

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INTRODUCTION

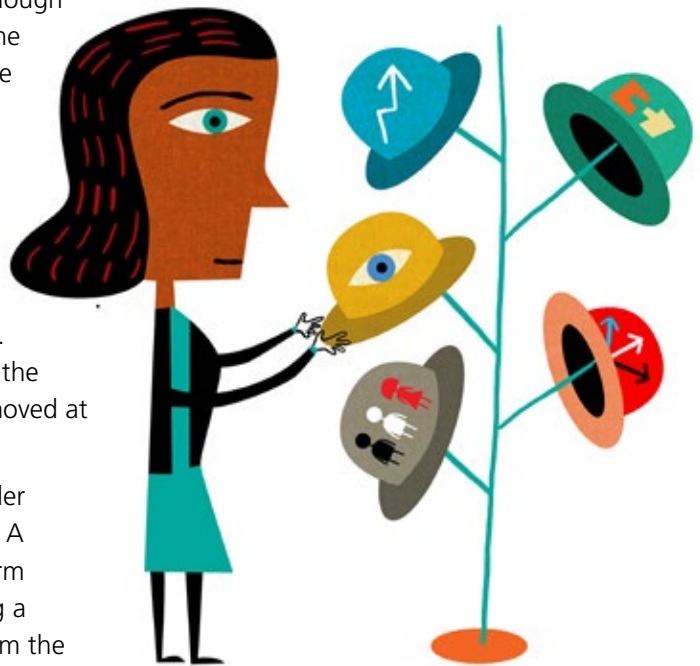
As noted in the preface, interim and acting leadership positions are common in medical schools and teaching hospitals. In the following pages, we'll look at the difference between interim and acting roles and the implications for the people in these roles and for the institution.

An "acting" title is used if a leader is absent or unable to fulfill job duties (usually on leave) but is expected to return. The absent leader retains the responsibility of his/her position but delegates the authority to the acting person. Because the position is temporary, acting leaders are expected to fulfill some of the same responsibilities

as their permanent counterparts, although they may not receive full control of the position. Due to the temporary nature of an acting position, the individual generally retains his or her normal job title. Occasionally, an increase to base salary or a leadership stipend is granted in recognition of the additional job responsibilities the acting leader has agreed to fulfill. Any increase is applicable only when the employee is "acting" and will be removed at the conclusion of the appointment.

An "interim" title is used if a leader will not be returning to the position. A leader may be completing a fixed-term appointment, resigning, or accepting a promotion, or has been removed from the position. An interim position is defined as a position filled temporarily while a search is conducted or a department/unit reorganization is taking place. An interim leader generally has both the authority and responsibility of the office. Use of an interim title usually requires a formal change in title and a pay increase. Title and pay revert to the original standing when the individual returns to regular duties. Alternatively, the interim leader may be hired for the position.

You should carefully consider the differences between interim and acting positions when accepting and completing a short-term leadership role. This guide provides tools and strategies to aid you in this process.



AN INTERIM OR ACTING POSITION OPENS

The creation of an interim or acting position may be anticipated or unanticipated; the need for interim leadership can happen abruptly. Depending on the situation, the school, hospital, or medical center may have a plan with responsibilities and expectations already mapped out. More frequently, however, if asked to take on an interim or acting role, you will need to negotiate to appropriately scope and resource the new position, including deciding how many of your current responsibilities you will maintain.

To appropriately scope the position responsibilities and expectations, first find out the anticipated duration of the position. Schools or teaching hospitals may or may not know exactly when a leader is scheduled to return or have a recruitment plan and timeline in place. Interim and acting positions can last from months to years. Knowing how long you are likely to serve will help you prioritize and negotiate the responsibilities of the position.

In an interim or acting role, you should expect to take on the routine tasks associated with the position. However, the appointment letter should explicitly outline the duties to be assumed. Long-range tasks, such as strategic planning, may be delayed or, if already underway, be slowed. You may need to prompt the institution to decide which initiatives you should continue and to what extent. For example, if a strategic planning initiative exists, should you begin framing or revising a plan and establish goals and procedures or wait for the person who will ultimately serve in the leadership position to take over those tasks?

You will need to consider many things when asked to take on an interim or acting position. We will share the available research and the wisdom and insights of those who have served in these roles to help you prepare for success.

ASSESS THE POSITION AND NEGOTIATE TO ENSURE SUCCESS

When a leadership vacancy occurs, your institution may or may not be prepared for the change. If the opening is unexpected, the institution should offer assurance quickly. A public announcement of what is going to happen helps to reduce anxiety. The school or hospital will be under pressure to do things swiftly. You may be under pressure to step in quickly. You will need to assess if you are willing to step in and fill the gap. Powers and Maghroori (2006) and Grigsby et al. (2009) caution that interim leaders are often expected to perform a wide range of administrative functions and immediately demonstrate leadership skills without managerial training, experience, or support.



Tips From Leader Interviews

Professional and Personal Considerations



Consider where you are in your career. If you are an early- or mid-career professional, taking on an interim role will be a larger sacrifice than if you are more senior. Make sure the changes made to your regular position to accommodate the interim role don't have long-term professional consequences. Carefully consider what will be different when the interim position ends. Negotiate for protected time if you are a medical school faculty member. Have conversations about task and client shifting if you are at a teaching hospital. Map out a path to recover from:

- Reduced ability to write or contribute to papers.
- The termination of grants — it takes a long time to get more grants to continue your work.
- Reduced academic obligations.
- Reduced clinical availability.

Are you interested in moving into leadership and management? Assess if taking this position will give you an opportunity to grow new skills and abilities and if it will open opportunities for advancement.

On a personal level, you will be working two jobs. Consider the effect of working many more hours and having increased responsibilities on your personal life. If you have a partner or spouse, talk through how taking the position will change the balance of responsibilities at home. Make sure you have the personal support you will need to ensure your success. Think through your current household responsibilities and how they will be covered if you are working significantly more hours per week. For example: Who's going to walk your dog? How will grocery shopping get done? Who will pick up the kids and prepare meals? Have a plan in place if you accept the interim or acting assignment.

If you decide you are willing to take on an interim or acting role, affirm that you are happy to help and ask for a short amount of time to think about and negotiate what you would need to be successful in the position. Ultimately, it is in the institution's best interest to prepare you for success. Huff and Neubrandner (2015) surveyed interim leaders in public universities and colleges and advise anyone considering an interim placement: "Ask for expectations in writing such as salary, length of position, option to apply for the permanent position and details about how/if they might return to their previous position. All these particulars should be determined prior to accepting the position. Individuals who neglect to attend to these details at the beginning of their term risk serving in the interim role for an extended period of time with a lower salary than is desirable, while putting one's own professional goals and scholarship on hold" (p. 14). When considering acting positions, get expectations in writing about the anticipated duration of service, the responsibilities and authority the position does and does not cover, and how you will return to your previous position.



Tips From Leader Interviews

Defining Your Role and Setting Yourself up for Success

Tool 2

Be prepared for organizational expectations to shift and know your responsibilities may shift as well. Accept you are going to be missing information but do your best to clarify what is expected of you in the role and to get commitments that will help you to succeed.

- Define the roles, priorities, and responsibilities of the position.
- Get clarity about your supervisor's vision — for the long term and short term.
- Establish what you are expected to accomplish and what will wait for the next leader.
 - Are you coming in to fix a problem or clean up a bad situation?
 - Or are you in a caretaker role to maintain stability?
- Assess which responsibilities (in your current job and the temporary role) can be redistributed.
- Develop a plan to recover professionally to:
 - Keep your promotion on track if you are a faculty member who has not yet attained tenure or the rank of professor.

- Retain your clinical reputation and referral network.
- Ensure you have the resources needed to accomplish the charge.
- Ask for someone in senior leadership to communicate the expectations for your position to the department, unit, group, etc.
- Ask for a mentor.
- Ask for regular check-in meetings with your supervisor to:
 - Help you solve problems.
 - Connect you to the right people.
- Ask to be informed of any sensitive areas or projects and which people must be kept in the communication loop.
- Understand the business and financial responsibilities. Ask for additional time with your business and finance colleagues.
- Request introductory training about budgets and human resources.
- Establish an estimated timeline and exit plan.

MENTORS

- Ask for a same-position mentor outside of your department or area of responsibility.
 - Ask to see his/her calendar — get an idea of what is expected.
 - Ask what meetings you need to attend (versus meetings where it is helpful but not imperative for you to attend).
- Identify an in-department or unit mentor — someone experienced who can advise you on the culture and politics of the department.
- Find a mentor outside of your organization (tap professional associations).

Negotiating the terms and conditions of an interim or acting position will help you succeed in this temporary role. The next two sections will outline some special considerations for researchers and clinicians.



Use the Tools provided at the end of this publication, also at aamc.org/interim-leaders.

SPECIAL CONSIDERATIONS FOR RESEARCHERS

The responsibilities for oversight of a biomedical or clinical research lab are vast. If you are a researcher tapped to step into an interim or acting role, you should consider where you are in your grant cycle and your tenure status. Ask about the anticipated length of service and determine how that timeline overlaps with your grant cycle. If you have a renewal coming up, you will need to ensure that you are properly resourced to succeed in the grant submission and administrative tasks associated with the lab. Similarly, if you are untenured, get necessary resources to maintain your research productivity. Lastly, if you want to return to research, ensure your ability to do so. If you decide to take on the role, here are some things to think about and ask for to ensure your success.

Tips From Leader Interviews

Make Provisions for Your Lab to Ensure Success

Tool 3

Carefully consider all your responsibilities and determine the tasks only you can complete.

- Ask for 25% of protected effort to devote to your lab.
 - Continue to hold your lab and staff meetings.
 - Write grants in collaboration with senior staff and postdocs.
 - Make sure you have students or postdocs who are skilled at writing research papers.
- Ask the administration to fund and hire a short-term research associate to cover some research duties and management of the lab or a postdoc to continue your research. The term of the position should include both the time you will be serving as a leader and the year following your full-time return to the lab.
- Network with peers in similar positions through groups such as basic science department chair societies, the Council of Graduate Schools (CGS) for graduate education deans, or the AAMC Group on Research Advancement and Development (GRAND) for research deans.



Use the Tools provided at the end of this publication, also at aamc.org/interim-leaders.

SPECIAL CONSIDERATIONS FOR CLINICAL POSITIONS

The responsibilities for leading in the clinical setting are both administrative- and care-related. In the clinical arena, interim and acting leaders are selected because they are leaders in their area of specialty, have seniority, have availability, or have held leadership positions in the past. They are often some of the busiest clinicians. If you have been tapped to step into an interim or acting role in the clinical setting, work with leadership and your colleagues in your specialty or subspecialty to determine how you can support them, retain your clinical reputation, and remain accountable to your sources of referral.

The tips below broadly apply to any interim or acting position but are especially relevant for clinical leaders who allocate a specific percentage of their 1.0 FTE effort for clinical and administrative responsibilities.



Tips From Leader Interviews

Assessing the Position and Task Shifting

Tool 4

When you agree to take on an interim or acting position, you must accurately assess the scopes of both your new and old roles and work with colleagues and senior leaders to shuffle responsibilities to ensure that the work you are taking on is aligned with organization priorities and is manageable.

- Determine the intent of the organization and the scope of work.
 - Are you expected to hold the interim position for a predetermined period of time?
 - Will any high-profile projects or initiatives need to continue?
 - What is the scope of your authority in this role?
 - If this is an interim role, are you being considered as a candidate?
- If you are still practicing, you must pay attention to your practice. You may need to:
 - Take less call.
 - Rework your clinical schedule.
 - Ask for assistance to cover referrals.
- Think through the time you spend on all the activities in your current role.
 - Is it essential you do everything?
 - Can someone else fulfill some of that work?
- Talk to your current colleagues and ask them to take on some responsibilities of your current role that can be shifted.
- Work with the other members of the senior leadership team at the hospital or in your unit or department and assess the workload to ensure it is as efficient as possible.
- If the job extends beyond the time and scope you expected, you will need to go back to the board or senior leadership to establish when the interim or acting role will end or to request additional help, resources, and compensation.

Surviving and Thriving
as an Interim or Acting Leader

The literature on interim and acting leaders in higher education indicates that these roles offer advantages and disadvantages to the individual and to the institution. We will explore these considerations along with suggestions from the field in the next two sections.

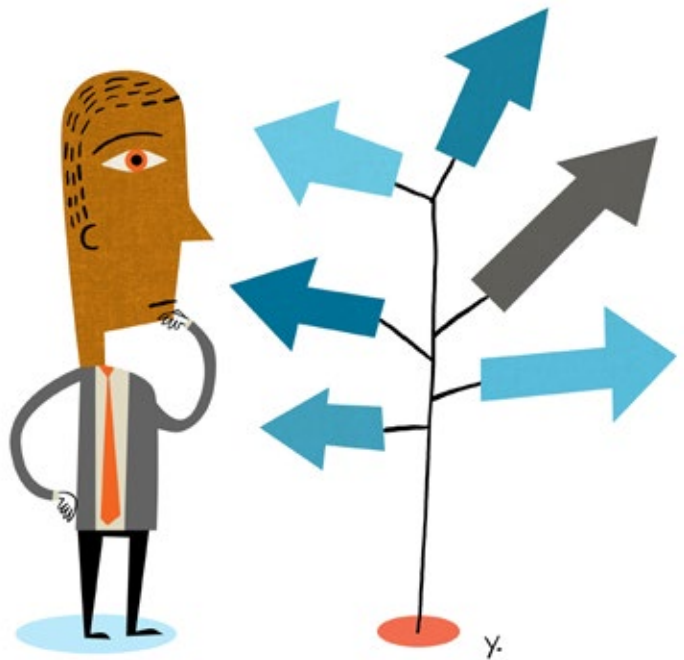


Use the Tools provided at the end of this publication, also at [aamc.org/interim-leaders](https://www.aamc.org/interim-leaders).

DISADVANTAGES OF THE INTERIM ROLE

Huff and Neubrander, in their 2015 interim leader survey, asked participants about the challenges or disadvantages they faced while serving in interim roles. From an organizational perspective, many agreed that being in an interim position limits one's ability to do long-term strategic planning. Munde (2000) found that interim job responsibilities mainly consisted of routine leadership tasks rather than visionary long-term pursuits. Rud (2004) also found long-range activities, such as faculty hiring, to be difficult under an interim leader. Interviews with AAMC constituents affirmed people are reluctant to accept a faculty position under an interim leader because applicants want to know whom they are going to be working for. Huff and Neubrander's participants expressed that being seen by faculty and staff as "temporary" is a disadvantage, and there is a sense of anxiety among faculty and staff related to perceived instability of the unit under an interim leader.

Additional barriers encountered by those interviewed for this paper included faculty and staff resistance to the direction taken by the temporary leader, questioning of the interim or acting leader's authority, and individuals' pushing their own agendas. Huff and Neubrander (2012) found that faculty and staff not aligned with the interim leader's vision may choose to "wait it out" until a permanent leader is hired. Additionally, faculty and staff may hesitate to work on something that the subsequent leader may change (Rud 2004).



Tips From Leader Interviews

Delay Decisions and Establish Stability

When you first come into the interim or acting role, collect information and limit decisions until you better understand the organizational structure, culture, and strategies.

- Schedule meetings with different stakeholders to listen and collect information.
- Make as few promises as possible.
- Extend the prior system and organizational structure to normalize and stabilize the situation.

- Don't make any changes until you assess the strengths of clinicians, faculty, and staff and understand how things work. Do not make hasty or reflexive decisions (especially with respect to personnel).
- Avoid making presumptions — take time to figure out the strategic direction of the organization.
- Form your own opinions carefully and keep an open mind.

On a personal level, Huff and Neubrander's survey participants felt that individuals serving in interim roles were disadvantaged by having to put one's professional or scholarship goals on hold. Survey participants also cautioned about the demands placed on the interim leader. Others noted their relationships with colleagues changed, which was seen as a loss (Huff and Neubrander 2015).

Leaders interviewed for this paper suggest the following to mitigate some of the challenges faced by leaders in interim or acting positions.

Tips From Leader Interviews

Building Support

Tool 5

- Stakeholder engagement is very important. Implement daily rounds within your area of responsibility to:
 - Understand the players and their perspectives, roles, and priorities.
 - Understand the environment from a multitude of perspectives.
- Meet with others across the organization to learn about their perspectives and challenges. Consider meeting with representatives from:
 - Compliance.
 - Human resources.
 - Finance.
 - Hospital leaders.
 - Nursing leaders.
 - Practice leaders.
 - Other units, departments, and schools.



Use the Tools provided at the end of this publication, also at aamc.org/interim-leaders.

ADVANTAGES OF THE INTERIM ROLE

Interim or acting positions are generally offered with little notice and not much planning. However, these roles offer some advantages. One advantage is the chance to try out the job and gain verifiable administrative experience before deciding whether to pursue administration in the future. Additionally, serving in a leadership role provides valuable insight into administrative work and a new perspective on the university structure, politics, and business (Rud 2004; Huff and Neubrander 2012; Huff and Neubrander 2015).



Tips From Leader Interviews

Preparing to Move Into the Role

- Know that you will be taking on a very different job and role.
- Prepare yourself — read leadership books and take classes.
- Do not assume you already understand the position. Talk to others in similar roles and listen for differences in perspective.
- Get to know your former colleagues through your new role. Ask what they need; again, do not assume you already know.
- Be proactive in getting the information you need to succeed. Set up meetings to learn about strategy, finance, and other functions that will intersect with your work.

Leaders interviewed for this guide felt that being entrusted to continue the work of the department and the opportunity to identify challenges to address are advantages of interim positions.

Advantages for institutions include the ability to make necessary difficult decisions, solve long-standing issues, and make changes prior to bringing in a new leader. Asking someone well-known to take on an interim role makes the transition between leaders easier and allows faculty, staff, and leaders to observe the person in the role before hiring him or her for the permanent position (Rud 2004; Huff and Neubrander 2015).



Tips From Leader Interviews

Weighing the Decision to Apply for the Permanent Position

- Evaluate whether you are interested in the job.
- Determine if you are permitted, as an interim leader, to apply for the permanent position.
- If the institution has indicated it would like you in the permanent position, and you are interested, indicate your interest right away.
- Even if the institution indicates interest in you and you apply, expect that you will not be given any indication of where you stand as a candidate during the search process.
- If you decide to apply but are not selected for the position, be prepared to return to your former position (or be ready to move on).

EMBRACING THE ROLE

Quite a few suggestions from the literature and the field can help you if you take on an interim or acting role. Huff and Neubranders' (2015) survey respondents' most frequent advice was to approach the job as if you have the permanent job. However, they also noted a challenge in balancing the need to function as if the role is yours and knowing that your time in the position is limited.

For making the experience beneficial to both the interim or acting leader and the organization, Rud (2004) notes the importance of sustaining morale, maintaining relationships with other units, and protecting the interests of your department or unit by serving on committees. To sustain morale, Rud suggests quick and easy ways to make positive changes in the environment, for example: "changing old hallway displays or bulletin boards, painting a faculty office, taking care of a messy mailroom or even a neglected staff refrigerator ... gives the impression of stability amid change." He also suggests monitoring and recording faculty and staff productivity in research and teaching so that time spent under the interim will be documented and rewarded.

Creating trust is of utmost importance in the interim or acting role. The literature suggests setting up regular conversations and visiting faculty and staff in their offices or work stations to build relationships and encourage open communication (Rud 2004; Powers and Maghroori 2006). Huff and Neubranders (2015) suggest that interim leaders coming in to clean up a bad situation can "use this opportunity to help mend internal and external relationships and to facilitate healing among the unit's faculty and staff."

The literature also provides some personal advice to people stepping into interim or acting roles — the foremost of which is not to take things personally. You will be questioned and criticized for your decisions and accomplishments in the role (Rud 2004). Rud also notes that leadership can be a lonely undertaking and stresses the importance of seeking out same-role colleagues in your organization. Huff and Neubranders (2012) encourage interim leaders to "remember this is the job you signed up for and be ready to move on when your services are no longer needed" (Huff and Neubranders 2015). The following tips provided by medical school and teaching hospital interim leaders reflect what is found in the literature and add some thoughts on maintaining wellness.



Tool 6

WELLNESS

- Be intentional about taking breaks and spending time with family and friends.
- Take care of yourself — get enough sleep, eat regular and healthy meals, take walks.
- Do not take criticism personally.
- Block off uninterrupted time for yourself during the day.



Use the Tools provided at the end of this publication, also at [aamc.org/interim-leaders](https://www.aamc.org/interim-leaders).

TRANSITION PLANNING

As with succession planning, transition planning varies among institutions. Some will have clear expectations mapped out, while others have a “do it yourself” approach. Whichever the case, your goal is either to leave the next person in a good position or take on the role yourself.

If you do not get or do not want the permanent role, you can help make the transition as smooth as possible by stepping back and readying the organization for the change.

Tips From Leader Interviews

Transitioning Out of the Interim Role

Tool 7

- Tie up loose ends. Complete anything that can reasonably be accomplished prior to the transition.
- Identify the opportunities or areas of development that should be a priority of the next leader.
- Map out key relationships for the incoming leader.
- Share important and sensitive information that is critical to the new leader’s success.
- Step back, but be available for consultation as needed.
- Make it clear to faculty and staff that you are no longer in the leadership role by directing them to the new leader.

Tips From Leader Interviews

Transitioning Into the Permanent Role

- Work with leadership to fully transition from your old role to your new role. This could include further distribution of any tasks you retained during your interim or acting role until new personnel can be hired.
- Request that leadership announce your selection.



Use the Tools provided at the end of this publication, also at aamc.org/interim-leaders.

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Tool 1

To Accept or Not: Professional and Personal Considerations

Directions: Use this checklist as a guide to help you think through the implications of taking on an interim or acting role. Write down your thoughts for each item. You can adapt any of these to meet your unique needs.

Career and personal life		
✓	Things to Think About	My Notes and Reflections
<input type="checkbox"/>	Career trajectory	Will you be able to recover? Are you interested in moving into administration?
<input type="checkbox"/>	Personal responsibilities	What are your current household responsibilities? How will they be covered?
<input type="checkbox"/>	Other considerations	

Tool 2

Define Your Role for Success

Directions: Use this checklist to prepare for a conversation with leadership about the expectations for the interim or acting role. Record your thoughts and questions to include in conversation with leadership. You can adapt any of these to meet your unique needs.

Role definition and expectations		
✓	Things to Think About	My Notes and Reflections
<input type="checkbox"/>	Expectations	What is your boss' vision for work to be accomplished in the long and short term?
<input type="checkbox"/>	New responsibilities	What are you to accomplish while in the role? What is for the next leader?
<input type="checkbox"/>	Current responsibilities	How will your current job responsibilities be covered? What can be redistributed and what cannot?
Setting yourself up for success		
<input type="checkbox"/>	Career recovery	What needs to be in place for you to fully recover from taking this position?
<input type="checkbox"/>	Resources needed	What resources will you need to accomplish the charge? Protected time? Task shifting? Additional staff, research associate, or postdoc?
<input type="checkbox"/>	Establishing authority	How will your authority with respect to your new roles and responsibilities be communicated? Who will communicate the expectations for your position to the department, unit, or group?

Tool 3

Considerations for Researchers

Directions: Use this checklist to prepare for a conversation with leadership about keeping your lab and research on track while filling an interim or acting role. Record your thoughts and questions to include in conversations with leadership. You can adapt any of these to meet your unique needs.

Professional considerations		
✓	Things to Think About	My Notes and Reflections
<input type="checkbox"/>	Grant cycle	Do you have an award renewal coming up? What is the timing of the grant and the anticipated time of interim or acting service? What resources will you need to do both well?
<input type="checkbox"/>	Tenure status	How will taking on this role affect your research productivity? Do you have any concerns?
Setting yourself up for success		
<input type="checkbox"/>	Protected lab time	What needs to be in place for you to be successful? Consider protected time, how to handle lab and staff meetings, and grant writing.
<input type="checkbox"/>	Temporary hire	Will you need the administration to fund and hire a short-term research associate or postdoc? How long should their term be?
<input type="checkbox"/>	Task shifting	Can any responsibilities be shifted to others on the leadership team or outsourced?

Tool 4

Considerations for Clinicians

Directions: Use this checklist to prepare for a conversation with leadership about developing a strategy to retain your clinical reputation and remain accountable to the physicians who refer patients to you while filling an interim or acting role. Record your thoughts and questions to include in conversations with leadership. You can adapt any of these to meet your unique needs.

Professional considerations		
✓	Things to Think About	My Notes and Reflections
<input type="checkbox"/>	Organizational intent	What is the scope of work and the timeline? How much authority do you have? Are you being considered for the role? Are you interested in the role?
<input type="checkbox"/>	Projects and initiatives	Are there any high-profile projects or initiatives that need to be continued? What are the timelines? Who needs to be kept in the loop?
<input type="checkbox"/>	Clinical and referral responsibilities	How will you protect your clinical practice and referral pipeline?
Setting yourself up for success		
<input type="checkbox"/>	Task shifting	Can any responsibilities be shifted to others on your team or the leadership team or be outsourced?
<input type="checkbox"/>	Administrative effort	Work with leadership to assess the administrative effort to ensure it is as efficient as possible.
<input type="checkbox"/>	Additional resources	Will you need additional help or resources?

Tool 5

Mitigating the Challenges

Directions: Use this checklist as a guide to help you think through how you will approach your new role and how you can build support. Select the items that represent an approach or action that you would like to take. You can adapt any of these to meet your unique needs.

Understanding the environment	
✓	Approach or Action
<input type="checkbox"/>	Schedule meetings with different stakeholders every day. <ul style="list-style-type: none"> • Do not assume that you understand the environment (even if you were working in it). • Your perception will change with your new role.
<input type="checkbox"/>	Make as few promises as possible. <ul style="list-style-type: none"> • Collect information and <i>listen</i> until you feel that you understand the environment. • Check your assumptions.
<input type="checkbox"/>	Stabilize the situation. <ul style="list-style-type: none"> • Unless charged to do otherwise, extend the prior system and organizational structure until you fully understand what, if any, changes need to be made. • Assess the strengths of clinicians, faculty, and staff, and understand how things are working before making any changes.
<input type="checkbox"/>	Assess the strategic direction of the organization.
<input type="checkbox"/>	Start with an open mind as you form your own opinions.
Building support	
<input type="checkbox"/>	Do rounds to understand: <ul style="list-style-type: none"> • The players and their perspectives, roles, and priorities. • Understand the environment from a multitude of perspectives.
<input type="checkbox"/>	Meet with others across the organization to learn about their perspectives and challenges. Consider: <ul style="list-style-type: none"> • Compliance. • Human resources. • Finance. • Hospital leaders. • Nursing leaders. • Practice leaders. • Other units, departments, and schools.

Tool 6

Embracing the Role and Thriving

Directions: Use this checklist as a guide to prepare yourself to move the work of your school, hospital, or institution forward. Select the items that represent an approach or action you would like to take. You can adapt any of these to meet your unique needs.

Prepare yourself	
✓	Approach or Action
<input type="checkbox"/>	Prepare yourself for the changes the new role will bring. <ul style="list-style-type: none"> • Read leadership books and take classes. • Read articles and research on moving from being a colleague to a manager.
<input type="checkbox"/>	Assess the landscape through the lens of your new role. <ul style="list-style-type: none"> • Talk to others in similar roles to understand their perspectives. • Talk to your former colleagues and ask what they need.
<input type="checkbox"/>	Proactively seek the information you will need to succeed. Schedule meetings with functions that will intersect with your work.
Wellness	
<input type="checkbox"/>	Take breaks. <ul style="list-style-type: none"> • Schedule time with your family and friends. • Block off time on your calendar for lunch. • Block off uninterrupted time for yourself during the day.
<input type="checkbox"/>	Practice self-care. <ul style="list-style-type: none"> • Get enough sleep. • Eat regular, healthy meals. • Take walks or do some other form of exercise that you enjoy.

Tool 7

Transition Planning

Directions: Use this checklist as a guide to think through the transition to your previous position or to the permanent leadership position. Record your thoughts for each item. You can adapt any of these to meet your unique needs.

Transitioning out of the interim or acting role		
✓	Things to Think About	My Notes and Reflections
<input type="checkbox"/>	Tie up loose ends	What can I reasonably complete before transitioning back to my regular position? What, if anything, must absolutely be completed by me?
<input type="checkbox"/>	Identify opportunities	Have I noticed any opportunities that could be prioritized by the next leader?
<input type="checkbox"/>	Key relationships	Whom should the new leader know?
<input type="checkbox"/>	Important information	What important or sensitive information do I need to convey to the new leader?
Transitioning into the leadership role		
<input type="checkbox"/>	Transition from your previous role	How will your previous role be filled?
<input type="checkbox"/>	Communication	Who will announce your selection?



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