

Five Developmental Tasks for the Interim Period

One of the most overlooked opportunities in executive transitions is how to make the most of the interim period, which is the time between the departure of the incumbent and when the new executive starts. Often boards think of this time as a problem and rush to find someone to “bridge the gap.”

Providing stable management for an organization when it is without a permanent executive is certainly a crucial role, but so much more is possible. A well-trained “intentional interim” can help institute changes that help turn around an organization in crisis. In stable organizations they can provide an important respite between a founder or other “big shoes” leader and his/her successor. This “interim time” is often essential for the organization to come to terms with its history; address any latent issues; and for the staff, board members, and volunteers to deal with their own sense of grief and loss in order to be ready to embrace a new leader.

The crucial task of the intentional interim director is to ensure there is a solid platform for the new executive. Over two decades ago, Loren Mead, founder of the Alban Institute, recognized the challenge of pastoral transitions and began to develop the “Five Development Tasks for Interim Ministry.”¹ These developmental tasks offer a proven framework for stabilizing and moving an organization forward during the interim period. We have adapted those tasks here for a non-church setting:²

1. Coming to terms with history. One of the fundamental tasks of the interim is to help the Board take an unvarnished look at the organization—its past, its strengths, its weaknesses, its shortcomings, and its accomplishments. In transitions involving an organization in crisis, especially when a termination is involved, there is often a tendency to magnify the shortcomings of the former leader while ignoring some of the underlying organizational issues that helped precipitate the crisis—issues which may have predated the “failed” executive’s hiring and probably still persist after he/she has left. The board can’t hope to have a “solid platform” for the new executive if the foundation is made wobbly by unresolved underlying problems. Coming to terms with history means ferreting out and addressing those problems as well as recognizing and truly appreciating the organization’s strengths and accomplishments. In a crisis situation, there’s a need to come to terms—very quickly—with the factors that precipitated the crisis.

2. Exploring identity and direction. An executive transition is a unique moment to shape the future of the organization unconstrained by the limitations of the executive’s leadership capacity and capabilities. Faced with replacing their executive, boards typically turn first to the departing executive’s job description. That should be the last reference point for launching a search; at best, the old job description describes the leadership role of the organization of the past, not of the future. Instead, the board should be looking forward, exploring the organization that they aspire to create and then shaping the job (and job description) around the present and future leadership needs of the organization.

3. Making leadership/operational changes. Quite often, a change in executives will spotlight other needed changes—in leadership, staffing, systems or structure. These changes can come in many forms: a board that realizes that its size is unwieldy and downsizes, a disruptive board member is encouraged to move on, an organization overhauls its underpowered financial system, etc. An extreme example in the news is a local United Way that faced a post-crisis loss of confidence. It replaced its entire board because the old board was too closely tied to the crisis. One of the tensions that the interim director faces is making or

encouraging the necessary changes while minimizing the disruption to the organization. The true test of any change is whether it will advance the organization without undue disruption. Filling key staff vacancies presents another tension. Generally interims try to balance effective staffing during the interim with the need to preserve the latitude of the incoming executive to build his or her own team.

4. **Renewing linkages.** Over time, especially in crisis situations, key stakeholders and supporters may become disengaged. One of the “platform building” tasks can be to bring some of them back into the fold. For example, a membership organization may have drifted off mission and lost members as a result. Having come to terms with history and refocused on its mission, it now has a case and a new message to begin the process of recovering its fallen-away members.

5. **Committing to new leadership and a new direction.** The final step of the interim process is making a commitment to the new executive and the new direction. At this point the organization should have a healthy perspective on its history, have worked during the interim period to build a solid platform for the new executive, and have a clear sense of the organization direction and priorities that it is laying out before the new executive. In short, it should be prepared to launch and support its new staff leader.