

Top 9 Tips for Boards Working with an Interim ED

By *benf*

Created 02/24/2014 - 11:18am

[JR Yeager](#) [1]



In the blog “[Interim EDs: Making a Good Thing Work for You](#) [2],” I wrote about the purpose and value added by engaging an interim executive director (ED) while you and other members of the Board of Directors step back and take some time to assess your organization’s current needs and prepare yourselves and the staff for working with a new permanent ED. In this post, I share my best advice on the Board’s role in this temporary relationship, focusing on how to partner with your interim ED and what to expect.

1. Interim means interim. Make it clear from the start (pre-hire, in fact) that the interim executive director will not be considered for the permanent position. Otherwise, you lose one of the most valuable attributes of the interim model: neutrality. A neutral interim executive will be more likely to “tell it like it is” and give you options to consider. If this isn’t made clear, the very worst case scenario (and I’ve seen it happen) is an interim who will spend more time jockeying for the permanent position than working on the issues she was hired to address.

A red flag: An applicant who states that she is “between jobs” and looking for a “new opportunity” might not be the right hire, as she may be viewing an interim position as a

pathway to a new ED position and not for the specialized, time-limited role it really is. At the same time, if you hire an interim who's really looking for an ED job and she happens to find a new position elsewhere while your organization is still in the middle of your interim trajectory, you could be left without a leader again. There are plenty of folks out there who understand the model and philosophy of interim management, so choose wisely.

2. Communicate your intentions. Let your funders, community partners, and even your clients know that hiring an interim executive was an intentional decision by your organization, not a fallback move. Make sure they know that the Board has deliberately set aside time to assess the organization's operations and goals, to address short-term issues, and to ensure the best and most relevant program delivery before beginning its search. Communicate, communicate, communicate.

3. Stay engaged and be available. You've just put in the time and effort to find the best person to steer the ship, perhaps through choppy waters. This is not a time for the Board to look away. The Chair and/or Executive Committee should be willing and available to meet more often than usual with the interim until he is on solid ground. Talk to your interim and find out what would be most helpful for him. It may be as simple as a regularly scheduled Friday morning conference call to touch base, share updates, and/or problem solve.

4. Don't shoot the messenger. Be receptive and open to possible bad news. Sometimes your interim may be the bearer of bad tidings, of information that may have been previously withheld, or of things you wish you had known about sooner. I'm painting a bleak picture with this point, but if you hire an interim because you just fired your permanent ED, or you are hoping the interim can pull off a major financial turnaround for you, then every day may not be rosy. So listen with empathy and remember it is your interim who is down in the trenches doing the hard work and taking the heat.

5. Allow adequate time for change to happen. Eliminating debt, restructuring programs, rebuilding the Board -- these things don't happen quickly. Create a timeline and revisit it with your interim often. It's not unusual for interim EDs to be in their roles for nine months or a year. That's OK if it is moving your organization toward the stability it needs in order to attract the right permanent ED. Flip side: Don't let the interim period drag on (and on). You can't stay in the interim period forever. At some point, you've got to do the hard work of recruiting and hiring your next permanent ED.

6. Hold your interim accountable (I can't say this enough). You may feel so relieved that you've found an interim in your time of dire need that you are willing to overlook missteps. But part of staying engaged is making sure your interim stays on the right path. Hopefully, you've set specific goals for the interim and you've discussed them with him at the outset of the assignment. Those goals may shift and/or be reprioritized throughout the interim period (and agreed upon during your periodic check-ins).

But keep your eye on your bigger goal of a stronger, more stable organization that sets your new permanent executive up for success. Track your interim's performance and expect answers to your questions. Respect the Board/ED relationship and give your interim the rope he needs to do the job. At the same time, remember your interim is a contractor or part-time temporary employee who, in a short time, could do as much harm as good. Ask for, and expect, more information and updates than you might normally ask of your permanent executive.

7. If you're part of the problem, be part of the solution. Be willing to hear and accept that the Board's own performance might be lacking and don't take offense; it's a tough job that you have taken on in your off hours. A stronger Board means a stronger organization, so take advantage of this time to strengthen your own role. Whether it's participating in a "Board 101" training to get everyone on the same page and using the same language, or working on your ability to be a better decision-making team, it all contributes to a stronger organization and a more rewarding Board experience for you in the future.

8. Don't ask your interim to conduct the search for your permanent ED. Sure, your grants may be limited and you might have to piece together a less-than-ideal hiring process if you don't have the funds to secure a search consultant, but remember that your interim already has her hands full. Conducting a thorough search and screening process is labor intensive and requires a set of skills that your interim may not possess. A better strategy might be to task your interim with finding funding to hire someone else to work with a Board committee and conduct the search.

9. Lastly, use this valuable time before you launch your search to reflect, ponder, and imagine the future you want for your organization and the community you serve. With every leadership change there are new possibilities. Are you interested in geographic expansion or contraction, new programs serving a new population, or venturing into fundraising territory where your former ED was uncomfortable going? Once you understand where you want to go, defining the skill set and characteristics of your next executive will not only be easier, but empowering and inspiring as well.

What has been your experience as a Board member working with an interim executive director? We invite you to share your stories in the comments section below.

***JR Yeager** is a project director with CompassPoint Nonprofit Services with twelve years of direct client experience in Executive Transition Management and executive search. JR also consults and trains in the areas of Succession Planning, Board Development, Interim Leadership, and also manages the placement of Interim EDs with CompassPoint's transition clients.*

Resources

- Workshop: [*For Boards: How to Prepare for Your ED Search*](#) [3], April 8, 2014 in Oakland

- Blog: “Interim EDs: Making a good thing work for you [4]” by JR Yeager
- Report: *Interim Executive Directors: The Power in the Middle* [5] by Tim Wolfred, CompassPoint Nonprofit Services, for the Evelyn and Walter Haas, Jr. Fund and the Annie E. Casey Foundation