

# *Pediatric Insight*

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## **In and Out- and In-Between: Successful Leadership Transitions**

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Child health leaders face challenges and opportunities—both professional and personal—at leadership transition points. As members of CareerPhysician’s Child Health Advisory Council, we present the following collected thoughts and advice we’ve received (or wished we had!) regarding leadership transitions, whether incoming or outgoing and whether the transition is to or from an interim or permanent position. We hope our reflections prove helpful both to faculty leaders who are at these career crossroads and to those who are engaged in recruiting, mentoring or coaching others.

### **For Incoming leaders**

- Consider holding a personal strategic planning retreat before you start. Agenda items might include:
  - Your mission & vision statements re: your new position
  - Goals of the organization(s) you’ll serve & their leaders’ expectations of you
  - Assessment of external factors that may impact your new position (e.g. regional/local competition; collaborative opportunities)
  - Review of the resources you’ve negotiated, those you’ll bring and those you may need to acquire down the line
  - Review of the division/department’s faculty and staff “org charts”
  - Brief outline of plans for your first 100 days; first year; five years
  - Preliminary schedule of “listening sessions” with selected health professionals (including trainees) in department, school
  - Family/Friends Focus Group—inform; listen; adjust; prepare
- Arrange a retreat with the department/division administrator
  - Understand the funds flow & current concerns
  - Set up a financial monitoring plan together
- Make a list of current or future mentors, coaches, and professional development programs (e.g. business of medicine; conflict resolution; transformation management). Continually re-evaluate and update the list as your needs evolve

- Consider succession planning early on—for both your position and for leaders and staff within your division/department
- Consider what your division/department needs are (or will be) and how your senior faculty can transition to fill some of those needs

Selected References:

- Lerman C & Jameson J. Leadership Development in Medicine. *NEJM* 2018;378:1862-63
- Stapleton FB, Jones MD, Fiser DH. Leadership Trends in Academic Pediatric Departments. *Pediatr* 2005;116:342-44

### For Outgoing leaders

- Well before leaving your current position, consider the legacy you wish to leave behind and work out a plan for achieving that legacy which may include:
  - Finalizing unfinished goals you've had that are achievable; passing on to others those that may be achievable in the future.
  - Exploring new opportunities within the division, department, hospital or elsewhere that will help you achieve your legacy
- As with Incoming Leaders, take every opportunity to do succession planning that supports your vision/goals but also realizes new directions, imperatives
- Consider holding (another) personal/professional strategic planning retreat. In addition to your legacy/succession plans, agenda items may include
  - Explore opportunities to remain at your institution/department/division—In a new role or with a different focus (e.g. teaching) or at reduced effort
  - Consider new directions you might wish to pursue or contributions you believe you can make—both within and outside academic medicine
    - Explore programs that could jumpstart your pursuit of those new directions (e.g. Writing Program; MHA; MBA)
  - Plan a comprehensive personal financial/health/resource assessment, including a meeting with university or practice plan HR—to understand retirement benefits/obligations
  - Hold another Family/Friends Focus Group

Selected References:

- Rayburn W, Grigsby K, Brubaker L. The Strategic Value of Succession Planning for Department Chairs. *Acad Med* 2016;91:465-468
- Cain J et.al. Meeting the Late-Career Needs of Faculty Transitioning through Retirement: One Institution's Approach. *Acad Med* 2018;93:435-439

### For Interim/Temporary Leaders

- Consider your goals/expectations in accepting this position
  - Strategic career move? Platform for a permanent position?
  - Learning opportunity?
    - "Trying on" the position? See if it's a good fit for you?
    - Leadership development—On the job training?
  - Opportunity to actualize new ideas/new projects/recruitments?

- Anticipated impact on your research, clinical, educational, administrative activities?
  - If not selected for the permanent position, what will you plan to return to/as? What's your exit strategy?
- What are the organization's goals/expectations for the Interim leader?
  - Caretaker/manager? Change-agent? Lame duck? Stabilizing presence?
  - What will be the extent of the Interim's decision-making authority?
  - Available resources?
  - Anticipated timeline?
- Understand the circumstances that led to the need for an Interim/Temporary leader
- As with Incoming Leaders, consider holding a personal Strategic Planning retreat with similar agenda items

Selected References:

- Merritt C and Clyne B. The Inevitable Interim: Transitional Leaders in Academic Medicine. *Acad Med* 2020;95:16-19
- Bailey DN et.al. Serving as a Temporary Pathology Chair: "Boon" or "Boondoggle"? *Acad Path* 2019;6:1-5

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