



Succession Planning

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Succession Planning - Executive Transition

Max Dupree, author of *Leadership is an Art*, declared, “**Succession** is one of the key responsibilities of leadership.” Yet of all the characteristics of leadership, legacy is the one that the fewest leaders seem to learn. **Achievement** comes to someone when he is able to do great things for himself. **Success** comes when he empowers followers to do things *with* him. **Significance** comes when he develops leaders to do great things *for* him. But a **legacy** is created only when a person puts his organization into the position to do great things *without* him.

Leadership 101: What Every Leaders Needs to Know, John C Maxwell

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Presented by Bryan Orander, Charitable Advisors, LLC for the Foellinger Foundation, 2013

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Additional Articles:

- “How to Do Successful Succession Planning: Guidelines”

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Basic principles and key practices compile a “check list” of factors to consider and implement...

<http://managementhelp.org/staffing/succession-planning.htm>

- “Non-Profit Executive Succession Planning Toolkit”

Published by Federal Reserve Bank of Kansas City

Tools to effectively implement succession planning and overcome barriers. Is intended for organizations that have no plan in place as well as those that wish to update their current succession plans. Toolkit includes an outline of key planning roles, readiness questions, overview of the succession-planning process, and templates for succession plans and complementary documents that organizations may tailor to fit their specific needs...

<http://www.kansascityfed.org/publicat/community/Nonprofit-Executive-Succession-Planning-Toolkit.pdf>

WHY IS SUCCESSION PLANNING IMPORTANT

For most chapters, the executive director transition is *a crucial moment in an organization's life: a moment of great vulnerability as well as great opportunity for transformative change*. You may know of organizations that have emerged strong from a turbulent transition, or weak from a calm transition; or organizations that have lost momentum, then morale, and finally staff members, because of unplanned or repeated leadership transitions. Years of investment and the trust of key supporters can be lost in a prolonged leadership crisis, jeopardizing the life of the organization.

Why would an organization risk so much by choosing not to plan ahead for changes in leadership? Some organizations have never had to think about transition at the top, because they are still being led by their founder. Some do not have a strong enough board of directors to take the lead, when the chief executive should move on but doesn't want to let go, or when the staff doesn't want to let go of their director. Others have a strong-willed or shortsighted director who makes the issue of transition difficult to discuss. The topic of transition is often emotionally loaded, because it touches on issues that are not easy to discuss openly. Often the organization avoids the discussion until a crisis arises.

Taking steps now will increase your readiness for this inevitable occurrence and increase the likelihood of a positive transition.

When we prepare for leadership transitions, not only are we showing godly wisdom which sees a season for everything – including leadership (Eccl 3:1; Ps 90:12), but we're following a Biblical pattern laid out by, among others, Moses (Nm 27), Elijah (2 Kg 2), John the Baptist (Jn 1:23; 3:30), the Apostle Paul (2 Tm 1) and, of course, Jesus Christ (Jn 17:18; Mt 28:18-20; Acts 1:8).

Leadership transition is a particular and significant form of change. In the Chinese language, the calligraphy or written character for change consists of the two elements of "danger" and "opportunity." If transitions are not managed in its best interests, the danger element might threaten the organization. If, on the other hand, transitions are used to take the organization forward, the element of opportunity will drive the change process.

No matter how powerful and anointed one is, they will eventually be replaced. While the current ED may find it a little unsettling, succession planning should be an ongoing discussion, not just when he or she decides it is time to leave. Illness or other life crises can't be prearranged, but having a succession plan can be. Every leader will be gone some day. Recognizing this as a fact of life, the concern for his or her present job is mitigated. Succession planning should be an annual item on the board agenda.

A key part of such transitions is reviewing the organization's strategic plan and its strategic needs, **along with** making the leadership changes.

Critical Questions to Ask in Succession Planning

* **If the executive is suddenly unable to serve, is it clear to everyone who will be the Acting Executive until the board can meet and decide?** Who will make the on-going day-to day decisions? Who will speak to the press? These are essential to to any emergency or contingency succession plan.

* **Is the executive director's job, in reality, doable?** Too often a successful executive director has, over time, taken on so many responsibilities that it would be nearly impossible to find another such superhero. A succession plan will identify the critical functions of the job, designate an emergency back-up for each function, and prepare the organization for both planned and unplanned executive transitions or vacancies.

* **Is the salary of the current executive director much lower than what should be paid to a new executive?** Sometimes a successful, long-time executive is being paid much too little - which ends up pushing other salaries down and makes it unlikely that qualified candidates would accept such a salary. On the other hand, sometimes an executive is making much more than is appropriate. Succession planning should include a longer-term effort to bring all staff salaries -- including the executive's -- into line with the market.

* **Can the chapter cover a fundraising dip?** The chief money-raiser in most nonprofits is the ED. It will take time for his or her successor to develop the relationships with donors that are essential to the incumbent's fundraising success. *Succession planning should include raising funds for the transition.* Part of the plan may consider launching a "legacy campaign" to give donors a chance to honor the out-going ED's community achievements with gifts to the endowment fund.

Fundraising can be linked to the chapter rather than the person by bringing board members and other staff into relationships now held only by the ED.

* **Are there any obvious candidates for the job?** In some cases an executive director may have been grooming someone internally for the job. In other cases it may be assumed that the Ministry Director wants and will get the job. There may be a board member who feels that he or she would be the best choice. The decision to hire is the board's and any such unspoken assumptions should be brought to the board. If, for example, it does seem appropriate to groom a particular individual, the board should be part of that process.

* **Does the Board of Directors have the right mix of members for hiring the new executive?** Sometimes a board that is best at supporting a strong executive is different from one that is well equipped to hire a new executive. A board comprised of great fund raisers may not understand the qualities that make for a successful nonprofit executive, or how to look for and screen candidates. Or a board that is very emotionally connected to the current ED may not be able to think objectively about what the chapter needs or the direction it could take. These cases may necessitate outside help

throughout the process in the form of adding new board members, hiring a consultant, and/or gaining input from the National Field Director.

Excerpts from “Succession Planning For Nonprofits of All Sizes” by Jan Masaoka & Tim Wolfred, 9/19/2005. http://corkuniversitypress.typepad.com/cork_university_press/2005/08/succession_plan.html

Succession Planning Framework

I. Organizational Level Thinking

Organization Chart

- Today
- Two Years
- Five Years

Employee Philosophy/ Retention Efforts

- Compensation and Benefits
- Culture – Hiring and Orientation
- Supervisors and Managers role in Coaching/Mentoring/Performance Evaluation
- Formal Training and Development
- Regular conversations and communication about personal performance, aspirations, development and role in organizational success
- Promoting from within

Strategic Reflection/Staff Development

- Key skills in the organization today
- Skills becoming more important
- Skills losing importance
- Skills lacking in our organization
- Definition of potential Career Paths
- How can organizational training and development help meet these needs?
- What changes will be required in defining position needs and hiring processes?

Matrix – Identifying and developing High Potential

<i>High Growth Potential</i>	Improve/Re-assign	Prepare for future role	Prepare for future role
<i>Possible Growth Potential</i>	Improve in current role	Improve in current role Coach/Mentor	Prepare for future role
<i>Low Growth Potential</i>	Coach/Move/ Remove	Improve in current role	Coach/Encourage/Find Best Placement
	<i>Low Performance</i>	<i>Meeting Expectations</i>	<i>Exceeding Expectations</i>

II. Position- Specific Thinking

Current Job Description

- How has this position evolved? How does the description need to change?
- What are the 3-5 focus areas that consume 70-80% of time and energy?
- What are the 1-2 focus areas that have the greatest impact when/if time is available?
- How Does This Position Contribute to the Overall Success of the Organization?
- What specific organizational goals does success in this position contribute to?

Contingency Planning

- Identify Key Functions and responsibilities with emphasis on those that no one else does/knows
- Identify Key Relationships with emphasis on those that no one else does/knows
- Document unique processes and relationships
- Review how coverage is handled for a short period of time and define strategies to extend interim coverage to 90 days in case of illness or turnover.
- Develop a list of people/organizations with contact information that would need to be informed in case of serious illness or turnover.
- Define plan to keep partner staff and managers adequately informed to be able to pick in case of a crisis.

Successor Development

- Who are potential candidates to fill these position in the future (in coordination with organization matrix above)
- What are plans to further develop these individuals for this role or similar role sin the organization? (see “Person-specific Thinking” below)

III. Staff Member-Specific Thinking

- Personal and Professional Aspirations
- Satisfaction in their role and loyalty to the organization
- Strengths in the Role
- Development Needs
- Opportunities to Excel in Other Roles
- Regular performance conversations
- Annual development plan – one goal defined by supervisor and one by staff member

ED Transition

Opening Thoughts

- ED Transition will be critical to the continued success of the organization
- A transition will test the organization's ability to renew itself
- Given Bob's tenure and impact → handle like the transition of the founder
- Plan must be multi-dimensional (ED, Board, Staff, Key Donors, Key Volunteers)

Common Pitfalls

- Not having a plan
- Lacking a clear "Vision" for the future
- Selecting a "just like"
- Not reviewing and updating job descriptions
 - ED
 - Board
- Announcing too early
- Not allowing/planning for overlap
- Not understanding that there might (will) be other turn over (Staff/Volunteers/Board)

Next Year Actions

- Define tentative timeframe
- Discuss post transition role for Bob
- Advise, when appropriate, in confidence, Stephen and Chip
 - Outlook for Bob
 - Assess their future
- Review and update job descriptions
 - ED
 - Board
- Board
 - Transition commitment
 - Future recruitment
- Review and update Mission/Vision/Values & Strategic Plan
- Begin developing the "Transition Plan"

Open Discussion

Resource: List

Date: August 17, 2011

Kern County YFC Associate Director Mentoring toward Executive Leadership Year 1 (2010 – 2011)

	PROCESS	OUT COMES
BOARD	<ul style="list-style-type: none"> • Board Meetings • Board Policy – on going review • Board Training – teaches 1 time 	<ul style="list-style-type: none"> • Understands the Board Chair and E.D. role • Is familiar with Board meeting and agenda process
BUDGET	<ul style="list-style-type: none"> • Overall Budget – is on budget committee • Grants – in on writing and development • Staff Support – set individual goals with staff and oversees progress • Ongoing monitoring of financial reports with E.D. • Works with E.D. on any course corrections as needed 	<ul style="list-style-type: none"> • To understand the budgeting process including serving on the budget committee • For the A.D. to be able to monitor and respond to needed corrections
FUNDING	<ul style="list-style-type: none"> • A.D. meets with E.D. and major donors – 6 minimum • Increased contact with financial partners • A.D. to work with 5 Board members to make presentations to their contacts • Banquet, Board Chair Party, Ride 4 Youth – A.D. has increased involvement 	<ul style="list-style-type: none"> • Begin a relationship with major donors • Increase his personal appointments and fundraising • Learn the specifics of our three major fundraising events
FORMAL TRAINING	<ul style="list-style-type: none"> • E.D. 101 YFC/USA • Attended Mid Winter 2010 • PAS Leadership classes – 2 	<ul style="list-style-type: none"> • Understand the key result areas of an Executive Director • Understand the relationship of the local ED with YFC/USA
STAFF	<ul style="list-style-type: none"> • A.D. goes over quarterly reviews of leadership team with E.D. • A.D. is apprised of and involved with all staff hires and dismissals 	<ul style="list-style-type: none"> • To become familiar with each leadership team members – successes & struggles • Understand the do's and don'ts of the hiring and dismissal process • Is familiar with the Operational Plan and goals for each department
YOUNG LEADERS	<ul style="list-style-type: none"> • Associate Director to put together a list of activities to invite Young Leaders to attend. He will work with Jon Stewart (board member) and the E.D. to expand the Young Leaders list. 	<ul style="list-style-type: none"> • Involve 8-10 Young Leaders and possibly their spouses in various YFC activities.

Kern County YFC Associate Director Mentoring toward Executive Leadership Year 2 (2011 – 2012)

	PROCESS	OUT COMES
BOARD	<ul style="list-style-type: none"> • Board Meetings –Board • Policy – on going review • Board Training – teaches 4 • Serves on Investment Committee • Meets with Executive Committee monthly 	<ul style="list-style-type: none"> • Understands the Board Chair and E.D. role • Is familiar with Board meeting and agenda process • Understands Board Policy
BUDGET	<ul style="list-style-type: none"> • Overall Budget – is on budget committee • Grants – in on writing and development • Staff Support – set individual goals with staff and oversees progress • Ongoing monitoring of financial reports with E.D. • Works with E.D. on any course corrections as needed 	<ul style="list-style-type: none"> • To understand the budgeting process including serving on the budget committee • For the A.D. to be able to monitor and respond to needed corrections • Is able to develop the budget and implement it
FUNDING	<ul style="list-style-type: none"> • meets with E.D. and major donors – 6 minimum • Increased contact with financial partners • work with 5 Board members to make presentations to their contacts • Banquet, Board Chair Party, Ride 4 Youth – has increased involvement and oversight 	<ul style="list-style-type: none"> • Begin a relationship with major donors • Increase his personal appointments and fundraising • Learn the specifics of our three major fundraising events and is able to verse them
FORMAL TRAINING	<ul style="list-style-type: none"> • Attended Mid Winter 2012 • Attend investment workshop taught by Gary Sampson • PAS Leadership classes • Participates in E.D. cluster • SWS Regional Conference 	<ul style="list-style-type: none"> • Understand the key result areas of an Executive Director • Understand the relationship of the local ED with YFC/USA • Implements Board Investment Policy
STAFF	<ul style="list-style-type: none"> • goes over quarterly reviews of leadership team with E.D. • is apprised of and involved with all staff hires and dismissals • Will have directly supervised every department head 	<ul style="list-style-type: none"> • To become familiar with each leadership team members – successes & struggles • Understand the do's and don'ts of the hiring and dismissal process • Is familiar with the Operational Plan and goals and is able to implement it and hold staff accountable
YOUNG LEADERS	<ul style="list-style-type: none"> • Associate Director to put together a list of activities to invite Young Leaders to attend. He will work with Jon Stewart (board member) and the E.D. to expand the Young Leaders list. • new board member from group 	<ul style="list-style-type: none"> • Involve 8-10 Young Leaders and possibly their spouses in various YFC activities.

Interview with Jim Lewis, Ret. Executive Director Kern County YFC

Q: You have a comprehensive succession plan, what brought this about?

A: I am a big believer in contingency plans – when something happens to staff, and it eventually will; a chapter needs to be ready and to know what will happen for at least the first three months. This is needed for all key leadership positions whether or not you are planning to leave at some point. I believe in developing leaders and especially when you know that in a few years it will be time for someone else to take over.

When I came back to Kern County YFC in 2004, they were without an Executive Director and for two years they had changing leadership; I was asked to come back and to work with the Board to move the program back to a healthy status.

I gave the Board a 5-year minimum commitment because consistency and direction was needed. I also immediately began to think of how to develop leadership and have the “right” person in place to take the program in the future.

I left Kern County YFC in 1993 to take the Southwest NFD position. Our region had been without an NFD for two years and we had been running it as an Executive committee; so I asked our board to make the call. They said, “Go do what you’ve done here for the rest of the region.” I thought we had a good transition plan in place; however I didn’t have time to do an intentional mentoring plan with process and outcomes. The program ran strong for about 6 years.

Q: Then why did you come back to Kern County YFC?

A: I left the chapter in good shape and then I came back 10 years later to provide direction, leadership, stability and make sure the Board, staff, plan and finances were in place. Again. The next time I left, I wanted to make sure the right people and process were in place – particularly by making sure the new executive director and staff were ready for the transition. My family’s support has always been part of any career moves I’ve made -- from business to ministry and now from full-time ministry to part-time. I’m almost 70 years old, have been in paid ministry for 40 years, and there are more things I’d still like to do. This includes staying on staff part-time to head up specific projects for the next 3-5 years. These projects include leadership development, building up our endowment, estate planning and serving the Board and Executive Director.

Q: How have you gone about “making sure the right person and process” were in place?

A: We began to improve financially, add ministry departments and staff; one of the people we hired fit the profile of an Executive Director and we began to move him into increased areas of leadership with the approval of the Board Executive committee, YFC/ USA, and the local leadership. After four years or so including meetings with Adam and his wife, Helen, everyone agreed that Adam was to be our next Executive Director. We then began the two-year intentional mentoring program. I value personality and style assessments and Adam Capehart’s Predictive Index showed he was executive director material. His StrengthsFinder outcomes solidified that appraisal. So we began our two-year succession plan with Adam (see “Kern County YFC Succession Plan” at <http://www.yfc.net/boards> under "Policies/Succession Planning")

Q: What specific public steps did you take to hand over the reigns?

A: We wanted to make sure there was no misunderstanding or surprises. In 2010-2011, we informed all of our major stakeholders; then we followed up at our annual fundraising banquet with an announcement of my transition into a new role in two years and the introduction of Adam. All donors who missed the banquet received a letter informing them of the coming change. He began to attend all the Board meetings during the first year of the two-year process to build relationships with the board and the leadership staff team. We took our time in order to move allegiances from me to him; the Board even asked me to give him his own office rather than being in the communal office setting so that everyone understood he was no longer “just one of the boys”.

Adam was totally familiar with and in agreement with our Operational Plan. That is the plan from which we run all of our performance reviews and then compiled into a monthly detailed report to the Board.

Q: What would be your best advice to a chapter just beginning this process? Looking back, is there anything you might have done differently?

A: I would not have done anything differently; this whole process was bathed in prayer. I love to develop people and my strengths are in the leadership and administrative areas. I knew that the new CEO of a multi- staff, \$900,000 program that was working with around 7,000 young people per year, must also have these strengths in addition to a heart for God and a desire to bring young people and their parents to Jesus.

My encouragement to other chapters would be to have a contingency plan in place that would include the Board Executive Committee and department heads. If you are an Executive Director and thinking of changing roles, I would encourage you to start “succession planning”. Begin the process with prayer and make sure you have operational and strategic plans that the Board and staff are supportive of and involved with. Past performance and test results will help you identify future leaders.

YFC DEAF TEEN QUEST LEADERSHIP TRANSITION

Bob's Perspective (National Director)

Over 10 years ago, Bob Ayres, founder and director of YFC Deaf Teen Quest (DTQ), met 21 year-old Matthew Belwood and recognized his potential. Bob noticed Matt's passion for the Gospel, keen intellect, relational skills and a "fire in his gut" that would propel him and serve this mission well. Since that time, Bob has intentionally "processed life" with Matthew, not just as a DTQ leader but because he cared for Matthew as a person.

After watching, mentoring and with time, coaching Matt, it became clear to Bob that Matt possessed all the specific skills for becoming his successor. In Bob's words, "Matthew can do everything that I do in ministry -- only better." The final phase of his grooming into the position required learning more of the intuitive skills or "soft" skills (think hardware vs. software) for effectively leading a national ministry; for this to reach completion, Matt needed to move to the same area with Bob for working together on a regular basis. These skills include discernment, currying favor; encouraging, inspiring, challenging, recruiting and grooming leaders; taking appropriate risks and helping to create a healthy, fruitful and sustainable culture of ministry.

Matt is not a clone of Bob's and brings many unique talents. This is an important concept for true leadership in avoidance to a maintenance mindset. As Bob says, "Matt can do anything I can do... but better." Leaders have to cherish surrounding themselves with people who are more qualified for certain roles than the primary leader. Bob's style of leadership development is essentially giving appropriate levels of challenge to his staff so that they find their limit and see their need to learn more. Offering responsibility that is a step above where the staff currently is, given their personality and abilities, stretches them to move up, all with a safety net of others who care for them.

At age 57, Bob considered turning over the national leadership role to Matthew at a point several years in the future, but his mentor, a businessman from Yum Foods, suggested otherwise. "If you wait until they are "ready", they will probably fail. They need the opportunity to start when it is still a stretch for them. You are confident they have the skills to succeed but it provides an energizing risk for them. They will rise to the task and give even more. If you wait too long they will be bored, burned out, or move on to another organization."

This transition is helped by Bob's vision and excitement for his own future in ministry. He is looking forward to broadening DTQ internationally, having more focused time for fundraising, and remain part of the DTQ national team as a colleague and mentor for Matthew. Bob believes that if someone waits too long to transition out of their national position, it becomes more difficult to let go and recognize the specific needs of the organization for new leadership.

Matthew's Perspective (Associate National Director)

Matthew Belwood explains how Bob Ayres has prepared him to assume the leadership of Deaf Teen Quest. While his response is ministry specific, the **greatest benefit of Matt's account is how Bob is grooming him spiritually and emotionally** in addition to skills, strategies, and knowledge about the role.

- **Emotional Support**

First and foremost, Bob was someone who was interested in my life. With this as a foundation, I've never felt like there was an agenda on Bob's part to "use" me to accomplish a specific task. Perhaps other deaf ministry leader transitions, the pressure was there to make sure their "precious baby" (i.e., their ministry) had a successor so it would keep "going" after the "founder" was gone. It's not the case in this point. There isn't a last minute urgency to get someone in place. It was borne out of a long-term relationship where we spent a lot of time just living life together in various situations.

- **Identify weaknesses**

Of course, we identify weaknesses where I need to strengthen. I'm able to listen and accept his feedback in this area because it's from a place where he's earned my trust. Case in point, I'm not always the most social person. We've recognized my tendency to withdraw, and we've even spent time exploring where this came from. The isolating tendencies of Deafness play a part, yes, but we've also explored how my previous wounds and experiences at previous places of employment and how I would rather avoid conflict. It never felt like identifying weaknesses was intended to rebuke or correct me, but to look at the ins and outs of the weakness and the psychology/thought process behind it.

- **Ensure strengths don't become weaknesses**

We can often explore how a valuable asset can become my biggest weakness. In my case, zealotry/aggression can have two opposite reactions, depending on if it was harnessed. The common thread so far is that it's okay to listen to this feedback to keep myself from making too many mistakes.

- **Identify emotional baggage/areas that need healing**

In the Deaf world, there are common issues that are unique and cause emotional wounds. These issues can affect one's effectiveness in ministry. Issues of isolation and responding to controlling people (speech therapists, parents, interpreters, audiologists, etc.) many of whom are women who may have become involved in a career "helping" Deaf children/individuals as a outlet for their "controlling" natures. These "scars" or bad memories certainly influence how I interact so it becomes important to be honest with a need for emotional healing.

- **Why I respond the way I respond**

Meta-Cognition (thinking about the way I think) is something we've gone through in different situations. What was my interpretation of the way someone said something? What was I feeling at that time? What did I think the other person's intention was? What was my perception of other people's body language? Thinking about the way I think influences my behavior and interactions with other people.

- **Lots of talking**

Bob and I spend hours talking about things. We meet regularly when we are both in town. We have begun to read a book together, *Spiritual Leadership* by J. Oswald Sanders; but this only happens with many hours of regular conversation. And the conversations are not always serious. We have equal parts laughing and sharing about the mundane.

- **Observing specific scenarios** (GROWgroup, leaders meetings, etc.)

At camps, GROWgroup, or other ministry settings, I've gotten feedback after Bob watched me interact, give a message, or some other aspect of the ministry event. This evaluation has been

valuable and I didn't ever feel like it was criticism. Recently, led a 6 person video conference and was getting off track, losing the audience and becoming flustered. Bob was observing and was able to give some feedback and help me get on track again.

- **Feedback**

I've mentioned this several times, but it's also both given and received. I've been able to give my feedback to Bob as well - two way street.

- **Sharing his own experiences**

We like to laugh at a lot at each of our stories. In addition, the lightness helps me to ensure that I'm not walking into the same traps and situations.

- **Cultivation of required ministry skills**

Some skills I do not have or are weak. One is collaboration, in some respects -- especially with other hearing people. We can be constantly looking at how we can address some of these so that they can become strengths.

- **Networking**

Bob knows a lot of people; he's been around longer. I'm introduced to several people in the community/nationally

- **Reviewing scenarios and "what would you do"**

Bob has brought up sensitive/confidential situations that have happened in the past, related to the ministry. These scenarios have allowed me to work through these situations in my head and figure out what I would do if I had to handle it. Instead of being surprised when I face a serious situation, such as a leader in another state having an inappropriate relationship with someone, we've worked through different ways these situations have been approached and the proper response. It's no substitute for the real thing, but a good start.

- **Identifying situations I could have done differently**

One situation involved me confronting a leader at camp who needed to suppress an issue that was becoming a big distraction. That leader didn't like it. Bob and I would go over the nuances of these situations and identify if anything could have been done differently. Sometimes, the reality is, people's feelings get hurt, and it had to happen. There was no way around it, but we would have loved to have a win-win-win situation. Unfortunately, sometimes some people have to lose.

There is a place of healing/healthiness Bob is helping me to arrive to that will help me take care of myself. As I assume responsibility of this ministry, the main thing in all of this is that I spend a lot of time with Bob. The daily interactions and processing the events as they happened help me sharpen my skills. We have a long history, close to fourteen years together; so listening to his feedback is more like talking to an old friend about life in general, but with a specific goal of preparing me. This has a huge benefit, rather than having someone I barely know, who is my superior, giving me information on sensitive areas of my life.

Understanding the Dimensions of the Transition Process

Every leadership transition has three dimensions: a personal, an organizational, and a cultural or community dimension. When you address problems that arise in the transition process or make plans to prevent problems in a future transition, you need to deal with the relevant factors in each dimension.

From the Perspective of the Outgoing Leader

If you are the one leaving the organization, you may find that your path to the exit is obstructed for personal as well as external reasons.

As founder or long-term leader, you may feel that the organization is like your child, whom you cannot easily leave in the care of a new director. You may feel strongly attached to others in the organization and your staff. Your commitment to the mission, and to your own ideas of strategic decision-making, may make you reluctant to let go of key functions.

To your staff and the outside world, you might be so closely identified with your organization that your identity and the organization's merge. Donors or key officials may insist on dealing with you and refuse to deal with others in your organization.

This merged identity may obstruct your departure. You might act in ways that sabotage your departure because:

- You may not be able to imagine a life outside the organization. *Some leaders, after retiring, have continued to appear at the office, working unpaid but as committed as ever, in a variety of consultative positions that may or may not be helpful.*
- You may feel a sense of loss, or conflicting emotions, as the time approaches when your title and other privileges must disappear. *As a result, for example, some outgoing leaders may begin to sabotage the transition process by delaying plans or actions, by withholding important information, or by only partly delegating responsibilities to staff members who show leadership potential. Such behavior is likely to send conflicting signals or to complicate the feelings of the staff and the board.*

Exit Styles of Leaders

In his book *The Hero's Farewell*, Jeffrey Sonnenfeld uses symbolic roles to designate different types of outgoing leaders, according to the manner of their exit after the official farewell.

- **Monarchs** do not exit until they are forced out by ill health (or death) or by some form of palace revolution, such as the resignation of top managers or an action of the board.

- **Generals** also depart under force. They leave reluctantly, while plotting their return to rescue the organization from the real or imagined inadequacy of their successor.
- **Ambassadors** leave gracefully. They frequently serve as mentors after they retire. They tend to remain on the board of directors. They provide continuity and counsel for their successor and the organization.
- **Governors** rule for a limited term, then shift to another vocational outlet after their exit. They tend to maintain little or no continuing contact with the organization.

Excerpts from “The Manager” Internet article no longer posted.

Bill Hybels Shares Succession Plans at Leadership Summit

By [Alex Murashko](#), Christian Post Reporter

August 10, 2012|8:39 am

<http://www.christianpost.com/news/bill-hybels-shares-succession-plans-at-leadership-summit-79787/#A3ra1Z7P4Jo8aoi1.03>

Willow Creek Community Church Pastor Bill Hybels, speaking during the opening session of a global leadership summit, took the occasion on Thursday to say that he and his church elders were formally engaged in a succession process.

"The elders at Willow Creek are quite aware that I turned 60 this last year ... They know my family history of heart disease. They know that I travel into high risk areas so they brought the subject matter of succession several times in recent years," Hybels explained to several thousand in attendance at his church in South Barrington, Ill., and a huge online audience watching the Willow Creek Association Global Leadership Summit.

"They finally asked me if I would be willing to enter more formal conversations about my potential transition out of this church. They assigned one elder that I know well and that I trust deeply and I said sure, why not."

Hybels, who founded the association and created the global summit, introduced the topic of his succession about half way through his talk on leadership to help other pastors and churches understand the process, he said.

The elders at Willow Creek Church chose someone who is personally close to Hybels to begin having the important conversations as to how the transition would occur.

"Our early conversations were a little awkward. We both knew what we were supposed to be talking about, but my leaving Willow is not the easiest subject matter," Hybels said. "But Mike (did not give full name) was extremely sensitive to my feelings to over the course of a full year as we talked about the future."

Hybels described four different phases of succession that were planned for Willow Creek and said the first phase that was the planning phase, which took about a year, had already been completed.

"Now, I'm a stoic Dutch guy and can take pretty difficult conversations, but had Mike tried to rush these conversations it would have been very hard for me," he said. "The first phase has been pretty well worked out."

Hybels and the church elders decided that during phase two, the phase that they are in now, they are going to try and find someone within the church to be his successor. They have "afforded a certain time frame" to find that person and if they are unable to they will search for an "external candidate."

"The last phase, the actual transition itself is where after we have found someone I gradually increase their responsibility and decrease mine," Hybels said. "We're hoping that that would take no more than 18 months or so."

"After that, I'm gently placed on an ice flow and pushed out to sea," he said, followed by much laughter.

"I am extremely proud of our board and how they did the process. In my view, they put on a clinic in doing this right. Beyond that, Willow's future feels more secure to me now that we have this kind of plan," he explained.

However, after the final meeting between the elders' board and himself, Hybels said that as he drove out though the church property he became nostalgic, remembering the church property when it was still a farm with corn fields. Then he remembered all the ground breaking ceremonies, fundraising campaigns, and baptisms.

"It was a very emotional night driving out of that meeting," he said. "It's been way tougher than I thought it would be, but I have many years of more exciting work to do here at Willow so I can only imagine how tough it's going to be the closer I get to the end."

Hybels encouraged church board members to understand how deep feelings run in the lives and hearts of senior pastors.

"Don't assign a person with low emotional intelligence to have these conversations with your pastor," he said.

Addressing senior pastors, Hybels said, "Some of you attempt to hang on too long. Do the right thing for your church. When you get to your late 50s and on to your 60s make sure that your greatest legacy is going to be to make sure that your church is well led after you leave it."

Concluding his portion of the message on succession, he said, "I'm in high trust mode that God is going to guide us through this exercise of this phase of the journey as He has for every other portion of Willow's journey. If we are the leaders that we all claim to be, I think we should turn over heaven and earth to make sure our churches are set up to be stronger after we leave them than when we started them and led them ourselves."

The two-day conference is being hosted and broadcast at more than 200 sites in the U.S. and in more than 260 cities worldwide in 85 countries.

Founded by Hybels in 1975, Willow Creek Community Church has grown to be one of the largest churches in the country, drawing more than 20,000 people every weekend.

DISCHARGING YOUR LOYAL SOLDIER

A Post-World War II Japanese ritual offers a meaningful demonstration of the importance of rituals at the time of transition.

In post-World War II, some Japanese communities had the savvy to understand that many of their returning soldiers were not fit or prepared to re-enter civil or humane society. Their only identity for their formative years had been to be a "loyal soldier" to their country; they needed a broader identity to once again re-join their communities as useful citizens.

So these Japanese communities created a communal ritual whereby a soldier was publicly thanked and praised effusively for his service to the people. After this was done at great length, an elder would stand and announce with authority something to this effect: "The war is now over! The community needs you to let go of what has served you and served us well up to now. The community needs you to return as a man, a citizen and something beyond a soldier."

This kind of closure is much needed for most of us at the end of our major transitions in life. *Because we (in the Western world) have lost any sense of need for such rites of passage, most of our people have no clear crossover to the second half of their own lives. The Japanese were wise enough to create clear closure, transition, and possible direction.*

Consider how your board, staff and community can help "discharge your loyal soldier" in a meaningful ritual that brings positive closure for your transitioning executive director, your staff, your board, and your community.

*Excerpted from "Falling Upward: A Spirituality for the Two Halves of Life" by Richard Rohr, pages 43 & 44.
Suggested by Bob Arnold*