

Leaving Well

A road map for succession planning
for founders and long-serving leaders



By Dr Claire Antrobus & Sandeep Mahal MBE

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The succession from a founder or long-serving senior leader to new leadership is a pivotal moment in an organisation's development. It can be an opportunity to build on success and to reimagine the organisation's future through a fresh perspective.

Given the lack of diversity at a senior level in the UK cultural sector, in terms of class, gender, race and disabilities, it is also an opportunity to ensure we seek out and attract diverse talent and inclusive leaders.

And, in the corporate sector, the model of the entrepreneur who starts up a successful business then chooses to step away and sell on the company to enable its next stage of growth is well understood.

But as the award-winning US TV series *Succession* highlights, planning for and handing over power can be a dangerous and disruptive time.

The departure of a successful leader can be followed by crisis or decline: Manchester United famously struggled for many years after the tenure of Sir Alex Ferguson.

In the non-profit sector the drama may not be as obvious as it often plays out behind Boardroom doors, or in confidential settlements when things go wrong. Painful and costly disputes involving the Board, new leadership and staff loyal to the former leader can occur. This can result in loss of existing expertise and high turnover of new leaders which can destabilise the organisation, damage its reputation, drain financial resource, impact performance or even threaten its existence.

Even when things go to plan, it can be a very challenging and isolating experience for the outgoing leader, provoking conflicting and unsettling emotions.

Through our work as leadership consultants and coaches supporting individuals and organisations to plan for and implement leadership succession, we have spoken candidly with leaders who have moved on from organisations they founded or led successfully for many decades, their Chairs and those who followed in their footsteps as the incoming leaders, from over 20 different non-profit organisations.

We found their self-awareness and willingness to share their learning with others incredibly useful in our understanding of how to plan for and support Boards and leaders through succession, and their advice to others preparing for this transition was remarkably consistent.

Conscious of the lack of information around this important topic in the non-profit sector, we wanted to offer a summary of the wisdom, advice and suggestions we've gleaned from these conversations to inform anyone currently thinking about succession as founder or long-term leader, or as a Board member.

Whilst the specifics of leadership transitions are unique to each organisation, a clear picture emerged of the common pitfalls, risks and issues arising. These are presented in this report, researched and compiled by **Dr Claire Antrobus** and **Sandeep Mahal MBE**, along with anonymised quotes from interviews.

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LEAVING WELL

Advice for founders & long-serving leaders

Having led an organisation for many years or having founded it yourself, the point at which your future path and the organisation's diverge is uncharted. Your own next steps, and those of the organisation no longer head in the same direction. This information is focussed on your path ahead.

Legally, it is the responsibility of the Board to consider what lies ahead for the organisation beyond your leadership and we have created a complementary guide for them. Taking in turn the key stages on the journey of succession, we have outlined what to expect, the key steps we advise you consider and suggestions about what support might be helpful.

Stage One: Before you set a date...

What to expect?

It is never too early to start thinking about preparing for transition, in fact many of the leaders we spoke to felt they had a responsibility to ensure the organisation was ready as succession might need to happen at anytime. When a founder or long-serving leader retires or decides to move on they can offer plenty of warning, but a change can also be triggered at short notice by serious illness or caring responsibilities.

One CEO described how panic, about how the organisation would manage without them, was their first thought after receiving a life-threatening health diagnosis.

Even, for planned transitions some leaders described needing years to start thinking about the major change ahead. Their advice was to take your time; the ability to let go and not be in control does not happen overnight and you may find you need to prepare the ground for the organisation to thrive beyond your tenure.

Key actions and considerations

Develop and devolve responsibility to your colleagues, so they can manage without you. For many reasons, it's wise to avoid dependence on your role.

Before you think about moving on, take steps to share responsibility and develop the leadership experience and skills of your colleagues.

One leader we spoke to was able to move onto her next role confidently, despite a 4-month gap between her departure and the next CEO's arrival, as she had invested time in developing her Senior Management Team so they were able to manage, in the interim.

Get yourself a strong and independent Board

We noticed a recurrent pattern in our conversation; typically Boards of founder-led organisations would often lack the confidence or maturity to handle the difficult decisions and conversations that often need to happen during succession.

One leader explained with regret how she had allowed her Board to depend too much on her for direction – something which had seemed desirable when things were going well as she could retain greater control.

But when she had to step away suddenly, due to family circumstances, the Board struggled to steer the organisation successfully through the succession period resulting in a crisis situation and loss of key staff and stakeholder support.

Embed the organisational values and ensure everyone understands and enacts them

When the staff and Board really understand the values, they no longer need to rely on your decisions and direction.

If you have successfully developed shared values and vision, that run through the organisation like the words in a stick of rock, then you can be confident the core direction is clear beyond your leadership.

Don't be a hero

It's very common that a founder's job description becomes un-doable both in scale and scope. Many founders allow their passion to mean they consistently over-work.

Also when a leader is in post over a long period they develop a broad range of networks, skills and knowledge that it would be impossible to have when new in post (and which they themselves didn't have when they started either). Reviewing your job description and workload annually and ensuring it reflects what you do and that your role is achievable within contracted hours is critical if your role is to be sustainable.

Support you might find helpful

Even from the earliest stage, before a decision to leave has been finalised, it can be useful to have support from the Chair, as line manager, and external support via coaching and/or mentoring.

Many founders found having a coach to offer an independent sounding board helped them clarify what they wanted and what was important to them.

Others found themselves a mentor who'd experienced similar transitions.

Stage Two: Planning for succession...

What to expect?

A decision to leave can be emotional for you and unsettling for your colleagues and Board. You need to be ready to accept that there is a possibility projects you care deeply about, or even the organisation, will fail without you and that you are not able to go back.

Once a decision is public, there can be many intervening months whilst a successor is recruited and then ready to take over the reins. Founders tell us this can be an uncomfortable time:

*'I was thinking I had made a terrible mistake.
I was thinking it's a great place, why am I leaving?
Even though I knew it was the right time to go.'*

Even the most confident of leaders can feel threatened or unsettled by the recruitment process and selection of their successor.

Key actions & considerations

Set a leaving date and stick to it

If you are not moving onto another job immediately it can be tempting for the Board to ask to keep you a little longer if recruitment timings slip, or for you to delay your leaving date if you think the organisation is not quite ready.

Founders told us it will probably never feel like the 'right time', and you can always find a reason to stay a bit longer.

But unless there is a crisis, most were clear it's best to set a specific leaving date and stick to it.

Ideally that date should not be too far off, because once a decision to leave has been communicated the transition begins and can be awkward and disruptive for everyone involved.

Recognise where your interests and those of the organisation are no longer the same

This can be really hard as you may have put the organisation's needs before your own for some time.

But it is time for the Board to consider what the organisation does next, and for you to focus on what you do next. Take responsibility for identifying where your personal needs, and those of the organisation, may no longer be aligned and discuss openly and honestly with the Chair how best to navigate and resolve these issues.

Keep clear of recruitment and selection

It is the Board's responsibility to lead the recruitment process. You may be tempted to help support them, but the potential for conflict of interest and influence means it is usually far better to step back and have no involvement.

Support you might find helpful

Founders who are not moving onto another role immediately, or retiring, can find it difficult to imagine what is next for them and this can result in feelings of uncertainty or fear.

Given how absorbed founders can be in their work, finding headspace to think beyond their role was often difficult without structured support or space. Those who've been in this position before advise making space and time to think about what is next for you before you depart. Employers can usefully offer financial support for re-training, or a research/ sabbatical period to explore new avenues for long-serving staff.

Employer-funded coaching can be invaluable in helping you think through how and when you want to leave and what you move on to; that might include new activities beyond work or a return to artistic practice. Having an independent, confidential, supporter available for any wobbles or thinking through of your options is often a helpful step in helping you 'let go' and feel more in control of and positive about the change ahead.

Stage Three: Towards the end... Handover.

What to expect?

We've spoken to Boards, outgoing leaders and incoming new leaders and found a big difference in expectation around handover. Boards and outgoing leaders often want the reassurance of a long handover period, over weeks and even months in some cases.

In stark contrast, incoming leaders wanted either no overlap or a maximum of a week, preferring to be briefed and have access – if needed – to the outgoing leader.

This might be welcome news to outgoing leaders because having coached and spoken with many during those final weeks of handover they can be the hardest part of the journey.

Key actions & considerations

Accept a new leader will do things differently

Founders advised that change is inevitable and whilst you might feel like this is criticism of your style or decisions or that the new leader is making a mistake, it's important to realise and accept change will happen.

Expect your successor to have their own way of taking forward the organisation and that this will be different to how you would have done this.

Support your successor but don't constrain them

It can be hard to know what decisions to make in the final months or weeks, and what to leave for an incoming leader. Many founders want to leave things in perfect order – which is unrealistic.

A good middle ground is to aim to avoid the incoming leader needing to make any big decisions in their first 100 days, but equally avoid committing them to decisions beyond that period, wherever possible. However given the volatility of the operating environment that is not always possible.

Handover notes can be helpful covering issues you think you've dealt with but which might resurface; the top 10 things you would tackle if you were staying; suggestions of up to 10 people to talk to. It's helpful to frame this as suggestions not instructions and this format offers a way to share information in a way that is not overly prescriptive for your successor or onerous for you.

Keep the handover period short

It's likely to feel very uncomfortable for both you and the incoming leader. Avoid the temptation to 'over-help' the incoming leader by assuming what handover support they need.

Better to limit any handover period to two-weeks maximum, and offer a few days later once they have their feet 'under the table'.

Models that had worked well included enabling the incoming leader to decide how much time they would like, and when, from the outgoing leader. Others had contracted up to 5 days' advice, as and when needed, after the outgoing leader departed.

Shape how you want things to end

After long-service in a role, colleagues, the Board and external stakeholders will want to celebrate and recognise your contribution and that is often important to the outgoing leader too.

Some founders enjoy large parties, others prefer more intimate and informal events.

One even told us they deliberately scheduled their last day for when no-one would be around, coming into the office on a Sunday to tidy up and leave alone because it felt too emotional to be around others after thirty years in a role.

There is no right or wrong way to mark the end, but many find themselves at odds with what others expect of them at this emotional time.

Identify how you wish to be recognised and your contribution celebrated, including how you would like your departure to be marked publicly, and discuss this with the Chair.

And be clear about what is important to you to achieve before departing e.g. completing a particular final project.

Discuss any future plans with the Board

Having significant experience in your field you may choose to stay involved in the sector in other ways, eg as a Trustee or consultant to peer organisations.

Despite your intentions, others may still associate you with the organisation, or see you as speaking for it.

To avoid confusion, discuss with the Board any plans you may have for future work and how you can continue to contribute beyond the organisation, including through paid work potentially.

Support you might find useful

If you have been working with a coach or mentor already then scheduling a few sessions during the handover period is often helpful for planning, and decompression!

It is common to feel over-whelmed by what you want to complete before departure, and a coach can help you clarify your priorities.

A good Chair will make time to be on hand to support the incoming leader, as well as you, during this period.

It can be a good idea to schedule a couple of 3-way meetings with the Chair and your successor to discuss and agree how you work together over the final weeks and days.

Stage Four: Finally... After you Leave

What to expect?

Many founders were tempted to stay connected and those we spoke to had tried various configurations (Board roles, project work, part-time roles), and mostly these had turned out badly for their former organisation, and for them.

A clean break can feel hard but is often best for you, and for your successor.

Moving on though can feel difficult, especially if you have not yet decided what comes next for you.

Key actions & considerations

Make a clean break

A decision to leave can be very hard when you have been responsible for an organisation over many years. Founders described it in terms of major life transitions such as divorce, or the empty nest feeling when a child grows up and no longer needs you.

It can feel safer, financially and emotionally, to retain a connection. But once you decide to leave, those who've been there before you strongly advise a clean break. **The vast majority who try to stay connected, later regretted the impact this had** on their successor, the organisation and themselves.

There was one exception to this, where there had been a crisis provoked by a messy transition and the incoming Director requested the founder joined the Board to lend support and credibility with stakeholders. **Otherwise, joining the Board as a former-staff member is definitely to be avoided.**

A clean break also means avoiding commenting on your successor's decisions publicly or privately - unless they request support and you are willing to offer it. Even being supportive could be potentially unhelpful - as there may come a time when you no longer wish to support them and this can be perceived as withdrawal of support.

Separate the personal from the professional

After a long-term employment, you are likely to have personal relationships colleagues which all parties may wish to continue on that basis after you have left employment.

Former colleagues may expect you to want to know how things are going with your former organisation. Consider either taking a break from connecting with work friends for a while or to suggest to work friends you don't discuss work when you meet up.

Support you might find useful

Founders we spoke to had continued to use mentoring and coaching after their departure, and some employers had offered to fund up to 6 months' support beyond the departure date to facilitate this.

Booking a holiday, or a course, immediately after your departure date was also advised, especially for those not moving onto a new role.

Thank you to all of our esteemed contributors...

Rachel Adams, Tom Andrews, Marcel Baettig,
Hilary Carty OBE, Lindsay Dunbar, Emma Hogg,
Susan Jones, Emmie Kell, Reyahn King, Judith Knight,
Kate Paradine, Matt Peacock OBE, Jeanie Scott,
Nina Simon, Amanda Smethurst, Holly Tebbutt, Jo Verrent,
Helen Wewiora and Sue Wilkinson OBE.

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A Clore Fellow, Claire is based in York and works with organisations that care about developing communities, tackling inequalities and creating social change. She began her career working with artists as a curator before moving into management and policy roles including at Arts Council England, Tate Liverpool, Middlesbrough Institute of Modern Art and British Council France. Recent projects include designing a new management training programme for the Marlowe Theatre, co-designing an international leadership programme for conservators and research projects around leadership succession planning and co-leadership models and diversity.



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Sandeep, a Clore Fellow, is based in Birmingham consulting with cultural organisations on enabling strategies that embed Equity, Diversity, Justice and Inclusion. Sandeep consistently works towards improving positive representation; she began her career in Sandwell Outreach Services and Race Equality Libraries. She was Head of Partnerships at The Reading Agency, and also managed youth literature programmes at Nottingham UNESCO City of Literature for five years, focusing on youth empowerment, providing opportunities, encouraging possibility and nurturing potential. She also chaired the UNESCO Cities of Literature Network from 2017-2021. Sandeep sits on the Boards of the Women's Prize Trust, World Book Day and Jaivant Patel Dance.