

A Founder's Legacy

Navigating the Emotional and Operational Waters of Succession Planning

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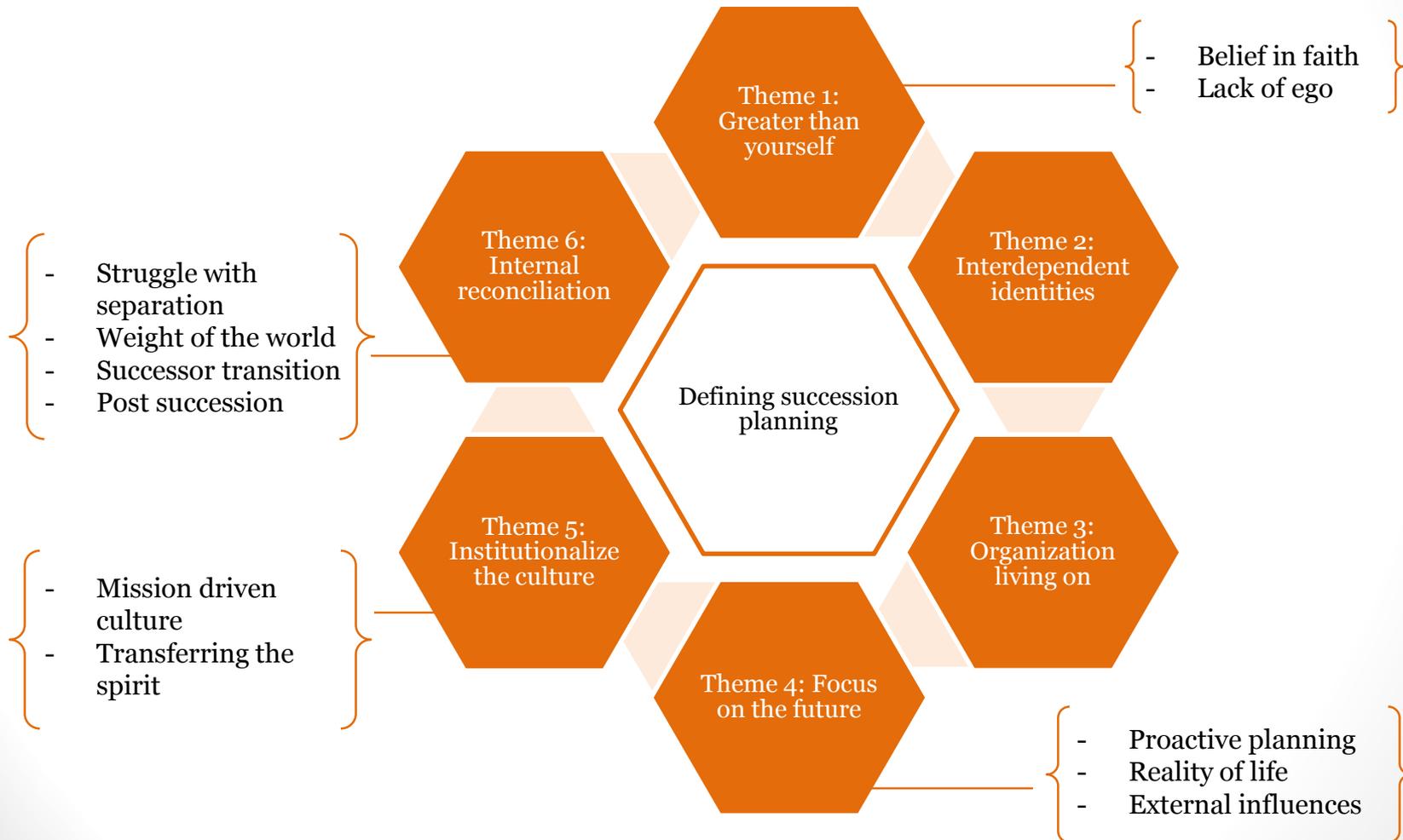
Defining Succession Planning

- Emergency leadership transition planning
(Greater Milwaukee Foundation, 2008; La Piana, 2016)
- Formal planning process for executive transition
(Adams, 2010; La Piana, 2016)
- Long-term leadership planning involving leader and talent development
(Adams, 2017; Conger & Fulmer, 2003; La Piana, 2016)
- Succession planning is “a deliberate and systematic effort by an organization to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement” (Rothwell, 2005)

Setting the Stage: Research Question & Method

- What meaning do nonprofit organization founding executive leaders assign to their experience with succession planning?
- 7 nonprofit organization founders in New York State
 - 4 women and 3 men
- In-person semi-structured interviews
- Self-identify as engaging in succession planning

Study Findings



Interpretation of Findings

- The participants' **positive attitude** about succession planning;
- the high degree to which they believe they have **control** over succession planning;
- the **influence of others**, including staff, the board of directors, and funders on the founding executive leader's **intentionality to engage in succession planning**;
- may be influencing how they assign meaning to their experience with succession planning.

Implications for Practice

- Founder's experience is very personal
- Involves rational decision making and emotions
- Foundational: Focus on the future
- Can have a multiplier effect
- Pursuit of sustainability
- The Founder's Process: Think about, talk about, take action

Long-Term Succession Planning

- Succession planning is not easy, it often is not quick, and no one solution will meet the needs of every nonprofit organization.
- Explore a guided approach to preparing and planning
- **The essence of succession planning is about life: The life of the organization as it is envisioned in the future; the separation of the founder's identity from the organizational identity, and the work to institutionalize the spirit of the organization.**

Questions to Consider

- How do we continue to work on creating a space to think about, talk about, and engage in succession planning?
- What steps can I take as a founder or as an individual who supports a founder to start the conversation about succession planning?
- As a founder, how have I thought about the organization “living on” into perpetuity past my tenure as executive director?
- As a founder, how do I think about succession planning? What does that mean to me?
- As a founder, what practices is our organization currently doing to support long-term succession planning?