

*Leadership transitions –
making or breaking an organization*

How to safeguard sustainability when leaders change

by
Agnes Lid & Angelika Marsch

Presented at the Christian Leadership Conference
at Høyskolen for ledelse og teologi
Oslo, 18 May 2022

Table of contents

1	Overview of research method and definition of scope	1
2	Findings	3
2.1	Responsibility of succession planning	3
2.2	Safeguarding organizational knowledge	4
2.2.1	Availability of outgoing director	5
2.2.2	Organizational DNA	5
2.2.3	Relevant written information	6
2.2.4	Other staff as resource	7
2.2.5	Networking	7
2.3	Spiritual discernment	8
2.3.1	Spiritual discernment for finishing well	8
	Specific divine guidance	9
2.3.2	Spiritual discernment for starting well	10
	Scripture passages and biblical figures	10
	Spiritual advice and insights	10
2.4	Leaders as stewards	10
2.5	Other observations	11
2.5.1	Research method and effects of the pandemic	11
2.5.2	Further learnings	11
3	Recommendations	12
3.1	Proactive boards	12
3.2	Transition committee	12
3.3	Process planning	13
3.4	Developing future leaders	13
3.5	Access to materials	13
3.6	Professional assistance	13
3.7	Spiritual vitality	13
4	Closing comments	14
	Bibliography	15

1 Overview of research method and definition of scope

This article is based on research among a selection of organizations belonging to the Wycliffe Global Alliance. “The Wycliffe Global Alliance is a community of more than 100 diverse organizations and networks serving together in Bible translation movements around the world. Alliance organizations share a common commitment: all people should have access to God’s Word in their preferred languages and formats” (Wycliffe Global Alliance, 2022). These organizations typically have a General Assembly based on membership, a governing board, and staff tasked with fulfilling the mission of the organization, and led by a Director or CEO. Our specific area of interest focuses on the transition of executive leadership.

Our main research question is: If it is common knowledge that much is at stake when a new executive director is to take over the leadership of an organization, how do organizations prepare for such transitions? Embedded in this overarching question are questions like, who is responsible for the transition process, and in which way is organizational sustainability safeguarded? Adding to that, we are interested in seeing whether it makes a difference when a transition takes place in a faith-based organization, like the ones we have looked at.

In total, we researched five organizations in Europe, one in South Africa, that have gone through a change in executive leadership during recent years. In each case, we interviewed the outgoing and the incoming director; seven male, five female, thus receiving input from twelve directors. The organizations vary greatly in terms of history, size and involvement. Their year of founding ranges from 1962 to 2008. In terms of size, staff numbers vary from 6 to 182, in terms of involvement in language projects, from 4 to 121. The transitions in focus took place between 2014 and 2021.

As a research method, we used interviews with fixed questions. All interviewees received detailed information about the reason for the interview, confidentiality, how the findings would be used, and other necessary practicalities. All signed a consent agreement. The interviews were conducted via Zoom (7 hours, 42 min), and later transcribed (48 pages).

As to the authors, Agnes Lid is the board chair of the Wycliffe Global Alliance and director of Wycliffe Norway, and thus a peer to the interviewees. Angelika Marsch has been a leadership development consultant with Wycliffe Europe for several years, and prior to that, director of Wycliffe Germany. Having held that role, Angelika Marsch was also one of the outgoing directors interviewed. Except for two of the incoming directors, all respondents are known to the interviewers.

One characteristic of the organizations participating in this research is that almost all of them rely fully on self-supported staff. That means most staff, including the directors, are paid or salaried from designated gifts, not from the organization’s general budget. Churches and individuals give regularly towards the support of the individual. Moreover, it means top leadership does not necessarily imply higher salary. With such a system, a change of roles within the organization and its global network often takes place smoothly as the person comes and goes bringing his/her own salary, so to speak. This may explain why as many as three out of six outgoing directors remained in their organization, and why four out of six incoming

directors were recruited internally. Another factor is that some of these organizations are based on individual membership among staff who vote to approve a new director before appointment is made. In these organizations, there is a tradition for choosing internal candidates.

To assure confidentiality, we have anonymized the findings. The directors have been coded D1 - D12, thus protecting the confidentiality of their responses.

1.1 Interview questions

In developing the interview questions, we leaned on Kaufmann's model of 'the comprehensive interview'¹ and followed his advice to use a set of precise and concrete questions as our research tool (Kaufmann, 1999, p. 66). The questions used in the interviews were the following:

- Who was in charge of (designing/planning) the transition process?
- In which way did their involvement contribute toward the transition?
- In which way was sustainability a factor considered in the hand-over?
- Was anything done to hand over organizational (corporate) knowledge? If so, in what ways?
- Which aspects of the transition were you prepared for?
- Which aspects were you not prepared for?
- What/who helped you most in this transition?
- Which role did your spiritual life play in the transition period?
- Was there a biblical figure or a particular Scripture passage that spoke to you during your transition? Please explain.
- In hindsight, what could have made this transition a better process for you to go through?
- What could have made it a better process for the organization?

Although some interviewees had asked to see the questions in advance, we did not reveal them beforehand because we were looking for spontaneous reactions. We followed Kaufmann's advice who points out that "the comprehensive interview is about a dialectical process between the interviewer and the respondent – and a third important pole, without which the interview makes no sense: the subject of the research [...] This third pole consists of experiences in the respondent's own life, which the respondent views as never before" (Kaufmann, 1999, p. 80). Such an interview allows for subconscious aspects to surface. Kaufmann points out that "at times contradictory and constantly recurring sentences" constitute an "enormously useful analytical tool, for they very often point to a process of central importance" (Kaufmann, 1999, p. 147).

1.2 Definition of sustainability

In literature, we find many definitions of 'sustainability', depending on which field of study the term is applied to. We have chosen the following definition of sustainability in organizational contexts as relevant to our research:

¹ Kaufmann's book in German "Das Verstehende Interview". In English "The Comprehensive Interview". All translations of non-English quotes by the authors.

Strong organizational fundamentals in place that enable the nonprofit to be a high-value asset over the long term. Prerequisite for true vitality (Adams, 2014, slide 9).

This definition points to a long-term perspective not only of survival, but also of purpose - enabling organizations to fulfill their vision.

2 Findings

One does not need to be an expert to understand that a high-level change of leadership is a crucial point of time in the life of an organization. Hence the title, *Leadership transitions – making or breaking an organization*. We have gathered information through interviews, but we have also consulted published articles and books about leadership and leadership transitions. Here the question arises whether the advice given by experts is practically applicable. We hope the following presentation of findings and discussion of literature will help shed light on these questions.

Senior partners at McKinsey & Comp. and authors of books on leadership, Keller & Meaney, claim that “a new senior leader’s action or inaction will significantly influence the course of the business, for better or for worse. Yet in spite of these high stakes, leaders are typically underprepared for—and undersupported during—the transition to new roles” (Keller & Meaney, 2018, p. 2). So what are the ways a new leader can be prepared, and what kind of support systems can be helpful? From our interviews, we see that well-functioning boards play a role, as well as church communities, friends and family. We also see that outgoing directors prove to hold an important role in helping the new leader get a good start. Very few of our interviewees have sought professional support although the experts recommend it. Keller & Meaney refer to a study by Patricia Wheeler stating that although tailored executive coaching significantly increases a new leader’s likelihood of success, most organizations do not use them.² It is outside the scope of our study to explore why this is the case, but the question is intriguing. Perhaps the nature of these organizations sheds some light on the lack of coaching. They are mission organizations, not businesses, and may have less of a tradition of paying for professional services than companies in the business world have.

2.1 Responsibility of succession planning

The answers to the first two interview questions show that the respondents understood them in different ways. Some understood it to mean, “Who decided on the succession?” while others thought it meant, “Who planned the transition process?” This is particularly obvious in the responses from one specific organization where the outgoing director saw it as a process guided by the board, whereas the successor thought it was up to him to make the transition happen. One incoming director also differentiated the two aspects: “The board was heavily involved in the selection, but the actual transition was done by [name of outgoing director]” (D8). The perception that the directors have to figure things out for themselves does not seem to be unique to these organizations, despite the fact that most leaders may not have much experience in handling transitions. Keller & Meaney write that, “[t]he typical unsystematic ‘hands-off’ transition approach relies heavily on new leaders to self-manage their transitions. However,

² Patricia Wheeler in: Keller & Meaney, 2018

most leaders experience only a handful of transitions [...] so for them, each transition remains more art than science” (Keller & Meaney, 2018, p. 3).

Interviewee	Board	Outgoing director	Incoming director
D1		x	
D2		x	
D3	x		
D4		x	
D5	x		
D6	x		
D7	x		
D8	x	x	
D9		x	
D10			x
D11	x	x	
D12		x	

Table 1: Responsibility of succession planning

From the gathered data, we learn that the transitions of leadership were a joint responsibility between the board and the outgoing director. While the succession planning was a board responsibility, in most cases the outgoing directors mainly handled the actual transition with all its facets. Only a few report about a proactive board in this phase, and only in one case did the board set up a committee to handle all aspects of the transition.

2.2 Safeguarding organizational knowledge

It seems clear that handing over organizational knowledge is a key factor for the sustainability of an organization during a transition. This was confirmed as all respondents underlined the fact that passing on organizational knowledge was a key factor in their transitions. It was important for those who took on the director’s position from within the organization, and it was absolutely life-saving for those who came into the organization from the outside. The overview shows that the majority of incoming directors were internal candidates; only two were external. One incoming director affirmed the insider choice by comparing this approach with “growing your own timber – like recruiting and retaining your own staff, [...] It’s good if you can grow your leaders from inside” (D10). We will later expand on this aspect under Recommendations, point 3.4.

Additionally, half of the outgoing directors stayed on as staff members, while three left after the handover. For those who stayed on, there was only a switch in responsibilities. The incoming directors considered it helpful to have continued access to the outgoing directors. As one respondent put it: “There was no problem in this transition, we still work very well together, and I would not change him for anything” (D4). In terms of actually passing on organizational knowledge, the respondents mentioned various factors, as indicated in the following chart.

	Overlap in office	Outgoing director accessible	Learning the culture	Written history	Handbook or manual	Other staff member	Introducing successor to key partners
D1	undefined			x			
D2	3 months	x	x		x	x	
D3	1 month				x		
D4	1 year	x			x	x	x
D5	6 months	x		x	x	x	x
D6	undefined	x				x	
D7	undefined						
D8	6 months	x		x	x		x
D9	1 year	x			x	x	
D10	1 month	x	x				
D11	3 months		x		x	x	
D12	undefined				x	x	

Table 2: Factors relevant for passing on organizational knowledge

2.2.1 Availability of outgoing director

The length of overlap between outgoing and incoming directors varied from one month to one year. It had nothing to do with the outgoing director leaving the office or staying on in a different position, rather with the modus operandi: Some arranged very structured proceedings (shorter period), others dealt with topics as they became relevant to the incoming director (longer period). All incoming directors felt that it was very helpful to have the outgoing director, or in one case the board chair, as a continued source of information, support, and encouragement. “I think it was very helpful to have the previous leader around to ask things, for him to be a resource person there with wisdom and support” (D10). Another one confirms this by saying, “I think for me the most important thing is that after I took over, that [person] is still there and I can ask her anything; that’s really a great help” (D12).

Although these incoming directors welcome the fact that the former director is still around, Stephanie Sonnabend, an American change agent consultant, suggests that it “is healthiest for the organization if the former leader has a well-defined and limited role” (Sonnabend, 2017). She prefers to have a clean break. Mark Conner, a British professor of social psychology, confirms this by saying “As the transition concludes it is essential that the previous leader fully let go of the baton and allow the new leader appropriate freedom to fulfill their role” (Conner, 2018, p. 49). One of the directors explicitly mentioned how helpful it had been that the former director left completely: “She always gave me space; she introduced me, but then stepped back. She almost vanished and gave me the stage. This was unbelievably helpful!” (D8). One of the outgoing directors underlined that “... good relationships and good communication are key in a transition” (D9).

2.2.2 Organizational DNA

Three respondents mentioned how vital it was to understand the organizational *culture*. The new director is stewarding an inheritance. As D2 points out, unless the new director understands the history, the culture, and the DNA of the organization, he or she may be leading the

organization off track. This is why a complete newcomer said he had asked the outgoing director to help him “with the specific culture of Wycliffe” (D2). This director was quite aware that he needed to grasp more than just knowledge. “I think that it is the unwritten stuff, the intangible transition that I really appreciated from her.” He continued by saying:

We implemented a new thing: We called it *From the archives* where we would invite people who had been long-term Wycliffe members to come and share in our team meeting; just come and tell their stories [...]. We needed to pick up on that DNA, so I think for me, sustainability was to understand our DNA and be moving that forward, understanding our core and moving that forward. Otherwise, you can be innovating outside of your core (D2).

One incoming director also alluded to the aspect of organizational culture and said that it was easier for him since he knew the organization from the inside. “Basically it’s got a lot to do with organizational culture, [...] the DNA of the organization, [...] the type of people that are there [...] and what makes them tick” (D10). Therefore, grasping the organizational culture is crucial for assuring sustainability in a leadership transition.

2.2.3 Relevant written information

The directors specifically mentioned two types of written sources: a summary of the organization’s development,³ and a handbook with policies and procedures. Both are helpful means for growing into a new job. For the outgoing director, it can be a relief, and, in addition, make it easier to let go - to leave something behind for the incoming person, as one outgoing director summarized: “So I took time to put my experience and knowledge into an update of the handbook” (D3). Another confirmed the usefulness of written materials: “We have quite a lot of things that we have in written form, we have certain policies, and so a good knowledge of those policies is also part of the process” (D9). One respondent underlined this by saying: “The way she contributed was that she wrote a document with all the director’s tasks, so that has been very helpful for me. Every time I feel like ‘Oh, my goodness, what did I forget?’ I can have a look at my personal manual, so to speak” (D12). In one case, the director and the leadership team had worked for almost two years to organize their institutional memory into an accessible database with relevant links to the documents related to the four circles outlined below (D5). The incoming director found this “extremely helpful” (D8).

³ A concise history of the Wycliffe organizations in Europe is found in Schöttelndreyer, Barnes & Meier (2016).

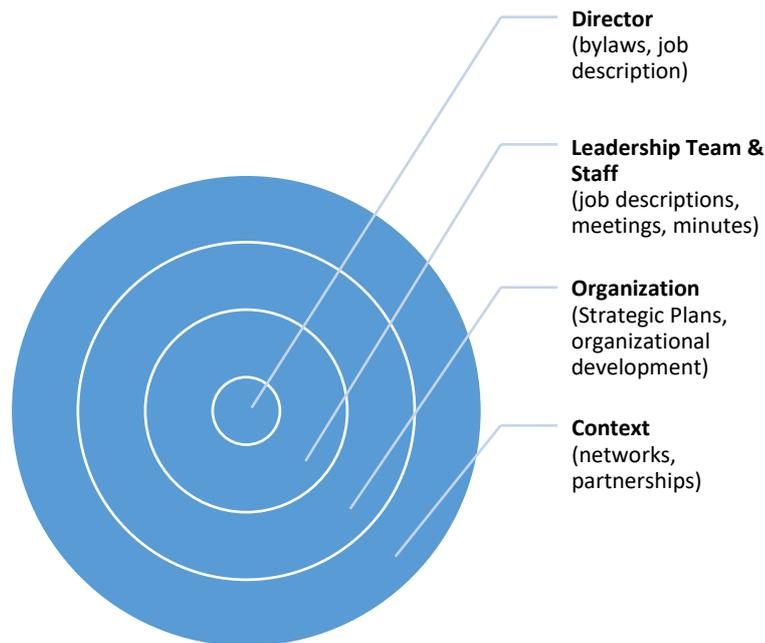


Figure 1: Institutional memory organized in a database

2.2.4 Other staff as resource

As much as the introduction by the outgoing directors and written materials were valued, the consistent knowledge of the office staff was an important factor toward sustainability. As one outgoing director put it: “There’s no way it could all depend on me [...] to do the full transfer of knowledge. This knowledge existed in others in the organization.” (D11). One incoming director confirms this by saying that one of the staff was “corporate knowledge embodied” (D12). It seems that in terms of sharing the vision, understanding the DNA of the organization, and getting the heartbeat of it, the outgoing directors were the most important source. As to passing on organizational *knowledge*, the middle management was central. Two of the incoming directors confirmed that it was the office staff who oriented them to all they needed to know (D2 and D9).

However, some organizations are so small that they do not have a middle management level. If those organizations do not have their organizational knowledge written down, there is a risk that institutional memory gets lost during a transition. One incoming director voiced her fear of what would happen if the retired director were not available. In fact, she relied on him “passing the knowledge and database of people, churches, groups, and who did what, when, and why from his head to mine” (D6).

2.2.5 Networking

Organizational knowledge is not limited to the organization itself. It expands to the context in which the organization is operating. Therefore, networks and partnerships are intricate elements of a transition, like one outgoing director pointed out: “Handing over knowledge is one thing; handing over relationships is another thing. To do that, I took the new director along to key partners to introduce her” (D5). Another director confirmed this by saying that “when you are

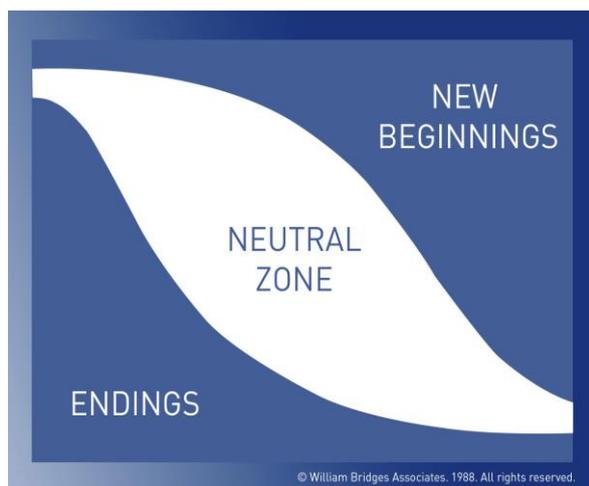
closely related to other partners, [...] you have to work with the partners in the transition” (D4). Regarding networking and partnerships, in every leadership transition it is important that incoming leaders be introduced to relevant networking platforms, and that they make an effort to familiarize themselves with the organizational environment.

2.3 Spiritual discernment

As Christians, we are quite aware that our being and doing is rooted in the Triune God. Naturally then, during a time of transition, spiritual discernment plays a crucial role. It was interesting to see that almost all interviewees mentioned the significance of daily devotions or the discipline of spending time in prayer and Bible reading in the discernment process. Only three out of the twelve, mentioned divine guidance where they felt that God gave specific directions. Advice from mentors, church leadership, and family members was significant to ten interviewees in their decision-making.

2.3.1 Spiritual discernment for finishing well

“All endings require inner work” (Scazzero, 2015, p. 294), says Pete Scazzero, pastor and author of a series of books and resources on “Emotionally Healthy Spirituality”. Most interviewees describe this inner work as a spiritual journey flowing out of a daily spiritual discipline. Through regular Bible reading, a healthy routine of prayer, and times of solitude, they got the sense it would soon be time for a change. “It was just this journey with God that I got the impression, now it’s time to hand it over and do something else” (D9). Spiritual insights about letting go were obviously most important to the outgoing directors. It was not the writing on the wall, but rather a growing understanding that it was time to step down and embrace something new. One said: “The Lord gave me [...] the confidence that he had chosen my successor already. He knew who this person was, and I could trust him for it” (D11). Another confirmed this by stating: “What helped the most was [...] the conviction that God was leading, and that he already had prepared the next phase” (D8).



Bridges in his well-known book “Managing Transitions” describes a transition consisting of three marked phases: endings, neutral zone, and new beginnings (Bridges Transition Model, n.d.). Endings and beginnings are obvious phases of a transition, but it is the middle phase, the neutral zone, that causes most stress: “The crisis consists precisely in the fact that the old is dying and the new cannot be born. In this interregnum, a great variety of morbid symptoms appear” (Antonio Gramsci, quoted in Bridges, 2003, p. 40).

Figure 2: Bridges Transition Model

Pete Scazzero admits that this neutral phase was the most painful period in his last transition. He relates this phase to Christ’s death and resurrection. The three days in between – in the tomb – are a figurative time used by God to purify and set free. “When I have remained with him, I discovered this in-between land of confusion was rich in insights and mercies. What looked like

an empty, blurry, inactive time turned out to be the place of my most profound transformation” (Scazzero, 2015, p. 248). The spiritual exercise of remaining with God is one acquired over time and not in a single moment.

It is in the neutral zone that the question of identity is prevalent. Kirk Franklin, former ED of the Wycliffe Global Alliance, shared openly what it cost him to journey through the neutral zone after having led and shaped the movement for over twelve years (Franklin, 2020). When seeing a counselor in preparing for the transition, his counselor focused on having a healthy identity. Furthermore, having understood that Western values of higher, bigger, and faster almost consider endings as failure, he sought help from a spiritual mentor in Asia who emphasized that ‘dying to ourselves’ is a natural part of being a follower of Christ. Franklin was encouraged by the words, “wait for the Lord; be strong and let your heart take courage, yes, wait for the Lord” (Ps 27:14).

Two of the respondents also mentioned that the question of identity surfaced. One emphasized the importance of his spiritual life being nourished even before the transition: “It gave me a firmer standing and foundation in terms of who I am, who I am in God’s perspective, what is my role, what can I contribute, and where are my limits” (D3). Another indicated that her identity struggles had nothing to do with losing a role, but losing people and relationships (D5). One explicitly mentioned that there were emotions that would take her “by surprise on any given day, especially after the first six weeks” (D11). American researchers Kunreuther, Segal & Clohesy came to similar conclusions and found that it was hard for leaders to imagine leaving a job that had “been the focus of their life – and often an expression of their deepest values – for so many years” (Kunreuther, et al., 2013, p. 9).

Specific divine guidance

In one organization, God intervened in a special way. The outgoing director felt that God spoke to her from Isaiah 49, where it says, “I’ve made you a polished arrow and hidden you in my quiver.” Her sense was that God said he was preparing the next leader to take over from her, that he/she would be ready at the right time, as a polished arrow waiting in the quiver, and when the time came was ready to fly. For a whole year, she prayed daily for her successor; that God would prepare him or her. At the same time, people in the organization were encouraged to pray and submit nominations.

The first time she talked with the nominee who later became the new director, she mentioned to him that God had told her the successor would be ready like the sharp and polished arrow that He was hiding in his quiver, referring to the metaphor in Isaiah 49. He could not believe what he heard. This verse had been given to him several years earlier in a context where he did not get a new job he had been hoping for. He had found comfort in believing that God was keeping him in his quiver until the time was right. Now this became a word of confirmation for him, that he should accept the offer of becoming the new director. Both reported a sense that God was leading the process and confirming the choice, which encouraged them and strengthened their faith.

2.3.2 Spiritual discernment for starting well

All incoming directors mentioned how crucial their spiritual life had been in the phase of embracing their new roles. They emphasized regular Bible reading, living daily in the Word of God, and processing matters with believing friends and the church community. Prayer was also highlighted by all interviewees; praying corporately before the search, praying together as outgoing and incoming directors, asking for prayer support from the church and from friends, praying in solitude, and praying with your family. One incoming director said that it was through prayer that his attitude regarding the new position had been shaped: “I will hold on to leadership very loosely. This is God's organization, it's not mine” (D2).

Scripture passages and biblical figures

Summarizing the Bible passages quoted by the incoming directors, most of them contained words of affirmation and assurance that God would be with them. One director referred to Daniel, of whom even unbelievers said that he was a man filled with the Spirit of the living God. “That’s just the kind of person I want to be, a person of integrity” (D10). Another director cited Psalm 90:1, “Lord, you are the stronghold from generation to generation”, and said that this verse invited her to serve the next generation (D6).

Spiritual advice and insights

For the incoming directors, a main element of the discerning process was including the advice of others. Outside counsel came from sending churches, from spouses, and mentors. One testified how her sending church had interceded for her in such a way that her anxiety vanished, and she was ready to take on the new position. “The sense of making the decision together [...] with my sending church has carried me through” (D8). Another stressed the importance of being rooted in a church by saying: “We all like church [...] It helps us a lot to have relationships, to have people to pray with, and discuss issues with” (D4). In addition, one director mentioned the impact of his spiritual advisor who had been in touch with him for many years and prayed for him regularly. When the decision arose to take on a leadership role, the advisor was available to pray with him. Words of affirmation from this person who knew him well, were helpful and reassuring (D10).

2.4 Leaders as stewards

The organizations represented in this research are all mission organizations. We would like to compare the roles of boards and executive leadership in such contexts to the roles of stewards. According to author Ken Wilson, the steward leadership model offers great hope for transformation and effectiveness in our kind of organizations (Wilson, 2016, p. 16). Wilson defines a steward as “someone who manages resources belonging to another person in order to achieve the owner’s objectives” (Wilson, 2016, p. 36). Why would this model have specific relevance for nonprofits and missions? Wilson explains:

[N]onprofit management is different because of distinctive purposes (nonprofits pursue social goals that do not easily lend themselves to measurement); restrictive resource acquisition (primarily funded by donors who have different expectations than customers); diverse stakeholders and governance (there is a much wider variety of stakeholders, which changes the nature of governance); and distinctive culture

(nonprofits have more participatory forms of decision making and are value driven)
(Wilson, 2016, p. 21).

It follows from defining the leader as a steward that the leader's main responsibility is to find out what the owner wants and to carry out his will. It also follows that there is no sense of entitlement to the assets the leader is stewarding (Wilson, 2016, p. 73). Although none of the interviewees mentioned the term 'steward' or the steward leadership model, it seems evident that this kind of attitude is prevalent in the directors. It helps explain why there was no focus on money or enumeration, and all the respondents expressed a clear desire to discern God's will for their lives and organizations. Based on these observations, we suggest that steward leadership can serve as a helpful model for leadership that promotes and supports a biblical value system.

2.5 Other observations

2.5.1 *Research method and effects of the pandemic*

As for the interviews, we used the set of questions in a rather rigid way, thus treating the interviewees equally and assuring comparability. However, this prevented us from going deeper and at times probing for specific emotional insights. As Kaufmann points out (see 1.1 Interview questions), an interview always has a third pole, which is the topic itself, and it needs space for subconscious aspects to surface. In hindsight, we wonder if an interview style allowing for more freedom might have been better. A second observation concerns the fact that we limited our interviews to the directors themselves. We did not ask board or staff members whether they considered the transitions successful.

The interviews took place during the pandemic. In some interviews, it became apparent that lockdowns and other restrictions affected the directors heavily. Two incoming directors transitioned during the pandemic and felt that meeting people only online added to the stress. Others felt that transitioning out was difficult because there was no face-to-face farewell from colleagues and partners.

2.5.2 *Further learnings*

We found that the following factors contributed toward a positive transition: support of the family, mentoring, and understanding your own personality at a deeper level. Only one leader confirmed that she sought professional coaching related to her next role. "I looked for help one year in advance before stepping down, which was very helpful" (D5).

We also identified a few factors that impeded a smooth transition of executive leadership. These are:

- lack of professional help in board training and organizational development;
- additional staff transitions happening simultaneously in the same organization;
- re-entry challenges when transitioning from abroad;
- the system of raising personal financial support practiced in most Wycliffe organizations;
- unresolved problems and complex structures inherited from predecessors.

In the scope of this paper, we will not address these challenges further.

3 Recommendations

From analyzing our findings and applying relevant literature, we want to emphasize seven aspects that play a vital part in a leadership transition: Proactive boards, a transition committee, process planning, developing future leaders, access to materials, professional assistance, and spiritual vitality.

3.1 Proactive boards

Safeguarding transitions is a board responsibility. Therefore, we believe a proactive board might be the most important factor for a successful executive transition. In most non-profits, boards are responsible for selecting a successor. Nevertheless, their responsibility should not end there. Lipper & Lazarus suggest four ways in which boards can contribute during executive transitions: They consist of defining a leadership profile and assisting in the recruiting process, helping in the transition planning, facilitating what needs to change in order to attract a strong leader, and organizing orientation and support for the new leader (Lipper & Lazarus, 2017). Another resource for boards adds an aspect to the first step indicated by Lipper & Lazarus: assessing the situation before deciding on how to plan the transition. First, the board needs to clarify whether they are working with a well-functioning organization, an under-performing organization, an organization in a perilous state that needs a turnaround, a start-up that is planning on a first hire, or the complete opposite – an organization seeking to replace a founder or long-serving executive (BoardSource, 2019). This assessment will show what key challenges the board faces. It would seem wise for a board to be clear about their role and responsibility, assessing the needs of the organization, and then act accordingly.

In summary, we suggest the following planning process for boards:

1. Analyze the organization's current status
2. Create a profile for the new leader
3. Communicate process to insiders
4. Search and select the new leader according to the profile
5. Assure that the exiting leader can finish well
6. Assure that the incoming leader is fully oriented
7. Communicate the selection of the new leader to external partners

Whether the boards are engaged themselves in all aspects or delegate the supervision to another body (see 3.2), they must assure that the transition is handled well. From our interviews, we conclude that some boards function well and took on the responsibility to manage the transition, while other boards would definitely need development and be more committed.

3.2 Transition committee

Bridges recommends setting up a transition monitoring team to help navigate through the phases of a transition (Bridges, 2003, pp. 148-150). Lipper & Lazarus describe how in their personal transition, the Board set up a "Leadership Transition Committee" which also included staff in the transition process (Lipper & Lazarus, 2017). In our research, the board of one organization set up such a committee to be in charge of handling the whole transition, which was especially meaningful to the outgoing director since she felt emotionally supported by the committee (F1). Kunreuther, Segal & Clohesy confirm the value of building a support system

during and after the transition. The assistance can come from professionals, family and friends, and from churches (Kunreuther, et al., 2013, p. 10).

3.3 Process planning

We recommend that the board or a committee set up a process for the transition, including relevant steps and a timeline attached to them. Sonnabend summarizes it well: “The smoothest transitions often have a well-articulated succession plan and clear processes for managing and communicating the changes. They also address the identity, emotional and relationship issues of both the former and new leaders and create an environment of open communication among the leaders and the board” (Sonnabend, 2017).

3.4 Developing future leaders

Several leadership resources as well as our interview findings point to the wisdom in developing future leaders who will be ready to step up when a leadership position becomes vacant. The Bridgespan Group suggests to a) foresee what leadership needs the organization will have in the future, b) look at current staff and see who can be developed to fill upcoming needs, and c) develop systematic processes for identifying future leaders (Bridgespan Group, n.d.). Another resource in the field, the National Council of Nonprofits, underline this and suggest looking ahead to identify challenges and leadership needs, drafting timelines for planned leadership successions, cross-training staff to be able to fill different roles, and supporting new staff with coaching and training in order to enhance their skill sets. One of their tips is perhaps most relevant for the issue discussed here: “Identify leadership development opportunities for staff and board members to expand their leadership skills so that the organization will have a ‘deeper bench’ of future leaders” (National Council of Nonprofits, n.d.). Developing an internal pool of future leaders, or a deeper bench, is well-founded advice for securing sustainability.

3.5 Access to materials

Facilitating access to resources on transitioning is another recommendation. One respondent mentioned that it would have been helpful to have materials specifically focused on transition. Kunreuther, Segal & Clohesy confirm this by saying, “Managing the transition is challenging enough, and resources that help organizations go through a leadership change – such as executive transition management materials – are invaluable” (Kunreuther, et al., 2013, p. 4).

3.6 Professional assistance

Although we could assume that new leaders have some executive experience, quite a few mentioned that they would have appreciated consultant help in the areas of team building, conflict management, and organizational development. One respondent wondered: “How do you get rid of the ashes so you can see where the coals are?” (D10). Especially if future leaders are developed within the organization, one cannot assume that they are fully equipped for stepping up into an executive role. Time and finances need to be allocated for further training in leadership tasks and for participating in leadership study programs.

3.7 Spiritual vitality

A final recommendation relates to spiritual vitality. David Ruiz, a pastor and missiologist from Guatemala, concludes: “Leadership transitions in Global Mission Organizations are a character test for outgoing leaders, for their successors and for entire organizations... The organization and its leaders show whether they are following a human vision or whether it is a godly one. It

is the time when the leaders show of what they are made, who is the source of their vision and on whom they depend” (Ruiz, p. 9). Consequently, it is life saving for leaders to develop a healthy spiritual life with a balanced view of themselves and their calling. Daily devotionals, a weekly rhythm of work and rest, regular personal retreats, and relationships of mentoring or coaching can counteract the danger of succumbing to what Ruiz calls “the symbiosis between the leader and the leadership position” (Ruiz, p. 4). Moreover, for Christian leaders, transitions are a valuable time to purify motives and to focus on Christ.

4 Closing comments

No doubt, a leadership transition marks a vulnerable phase for an organization. There is a risk of losing momentum, organizational knowledge, and – ultimately – impact. People not suited or ill equipped for the task may be appointed. Stakeholders and supporters may lose trust. Consequently, a leadership transition can affect the sustainability of the organization.

In this article, we have sought answers to the question: If it is common knowledge that much is at stake when a new executive director is to take over the leadership of an organization, how do organizations prepare for such transitions? Our findings show that it varies how well transitions are planned and carried out. The recommendations listed sum up the insights we have gained. Our view is that every organization should consciously shape their leadership transitions by investing time for the process and allocating the resources needed, enabling the organization to be a high-value asset over the long term and retain true vitality. This takes a proactive board and also close cooperation between the board and both outgoing - and incoming directors.

Our research is focused on a selection of mission organizations in the Wycliffe Global Alliance that have gone through leadership transitions over the last few years. Most of the literature we have consulted is therefore directed at nonprofits and missions; however, a few address leadership transitions and change in general. We believe our findings and recommendations have relevance also beyond the world of faith-based organizations.

What seems specific to the world of mission organizations though, especially compared to the corporate world, is the integration of spirituality, the view of ownership, and the understanding of roles. We have observed that an underlying premise for all our respondents is the understanding that God owns the work; It is *God’s Mission*, in which they are participating. Therefore, all express a desire to discern God’s will and be good stewards of His resources. Consequently, we ask the question: is the spiritual dimension incorporated in the life of a faith-based organization an added value? Does it make a difference? If yes, that dimension should not be ignored. In our view, it is clear that spirituality can be a true asset in the life of an organization, also during transitions.

We, as authors, were motivated by a desire to contribute insights and advice to Christian organizations in the area of leadership transitions. By learning from others’ experiences as well as experts in the field, may we strengthen our capacity to handle leadership transitions in such a way that they make, and do not break, our organizations. That, in turn, will contribute to sustainability and good stewardship of resources in our care.

Bibliography

- Adams, T. (2014, March 11). *Sustainability, Succession and Transition Planning*. Slideshare. <https://www.slideshare.net/RAFFALearning/2014-0311-sustainability-succession-transition-planning>. Accessed 2022-04-21.
- BoardSource (2019). *Five Leadership Transition Types*. BoardSource. <https://boardsource.org/resources/five-leadership-transition-types/>. Accessed 2022-04-25.
- Bridgespan Group. (n.d.). *Leadership Succession Planning*. The Bridgespan Group. <https://www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/succession-planning>. Accessed 2022-04-21.
- Bridges, W. (2003). *Managing Transitions: Making the Most of Change* (2nd ed.). Perseus Pub.
- Bridges Transition Model. (n.d.). *Bridges Transition Model*. William Bridges Associates Transition Management Leaders. <https://wmbridges.com/about/what-is-transition/>. Accessed 2022-04-03.
- Conner, M. (2018). *Pass the Baton: Successful Leadership Transition*. Independently published.
- Franklin, K. (2020). *Transitioning as a Leader*. [Unpublished paper April 2020].
- Kaufmann, J.-C. (1999). *Das verstehende Interview*. UVK Universitätsverlag.
- Keller, S. & Meaney, M. (2018). *Successfully Transitioning to New Leadership Roles*. McKinsey & Company. <https://www.mckinsey.com/business-functions/people-and-organizational-performance/our-insights/successfully-transitioning-to-new-leadership-roles>. Downloaded 2022-02-17.
- Kunreuther, F., Segal, P., & Clohesy, S. (2013). *The Leadership in Leaving*. VAWnet. <https://vawnet.org/material/leadership-leaving>. Accessed 2022-05-10.
- Lipper, L. & Lazarus, W. (2017). *Six Strategies for Nonprofit Leadership Transitions: How to Successfully Hand off Your Organization to the Next Generation*. Stanford Social Innovation Review. https://ssir.org/articles/entry/six_strategies_for_nonprofit_leadership_transition. Accessed 2022-04-20.
- National Council of Nonprofits. (n.d.). *Succession Planning for Nonprofits – Managing Leadership Transitions*. National Council of Nonprofits. <https://www.councilofnonprofits.org/tools-resources/succession-planning-nonprofits-managing-leadership-transitions>. Accessed 2022-04-21.
- Ruiz, D. D. (YEAR). *Transitions in Leadership: Critical Survival Issues for Global Christian Mission Organizations*. Source unknown.
- Schöttelndreyer, B., Barnes, A., & Meier, E. (2016). *Connected: A History of Wycliffe in Europe*. Wycliffe Global Alliance.
- Scazzero, P. (2015). *The Emotionally Healthy Leader*. Zondervan.
- Sonnabend, S. (2017, October 20). *Four Keys to Successful Leadership*. RealLeaders. <https://real-leaders.com/4-keys-successful-leadership-transitions/>. Accessed 2022-02-20.

Wilson, K.R. (2016). *Steward Leadership in the Nonprofit Organization*. IVP Books.

Wycliffe Global Alliance (2022). *Who We Are*. Wycliffe Global Alliance.

<https://www.wycliffe.net/about-us/> Accessed 2022-04-19.