Succession for Long-Term Success

Activity

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Succession is the process of handing over responsibility for "holding" a group or a project and is one of the key issues for long-term success. Sometimes succession is about a leadership role, though it can also take many forms. Those who originally set up a group or a project usually feel passionate about it and give a lot of time and energy to keep it going. So what happens when it's time for them to move on?

Succession can be messy and problematic. A few things to try to avoid are:

- The original members keep going until they burnout or collapse, sometimes taking the whole project with them (see Burnout to Balance).
- Newcomers don't step into responsible roles; or there are no new members joining.
- Newcomers attempt to step into responsible roles, but the original members find it hard to let go. This can lead to a battle for control; sometimes people prefer a project to die rather than allowing a new vision to shape it.
- The original members step away too quickly and newcomers are left floundering.

It is possible for a group to move through a process which helps to avoid these difficulties. Below you'll find some exercises to help your group talk about what can be a sensitive topic. This can help you to initiate a positive succession process, where everyone's contribution is appreciated; where longer-serving members can be honoured and have a graceful letting go; while newcomers can be supported into roles of responsibility in an empowering and satisfying way (see Effective Groups, see Feedback Culture).

When is a good time to pay attention to succession?

John Croft, founder of Dragon Dreaming, recommends that as soon as someone is in a role of responsibility they start actively looking for a deputy. This makes sense in terms of resilience – that someone else knows about that role, and they are able to step into that role in the future. As a group, it's helpful to pay attention to this before the original members are

exhausted – while everyone still has some of their original excitement and energy. It can help to focus on finding and supporting newer members who might become successors (see Respecting 'Yes' and 'No', see Inner Feedback for Personal Resilience, see Group and Personal Sustainability).

This process can feel emotionally charged

It's super common for some tensions to arise around the succession process. Talking about them openly can begin to relieve such tensions. It can help to start with a simple warm-up exercise to share people's previous experience with succession, and any beliefs people have. See below for a list of some of the issues that might be going on under the surface.

Insights Around Founders and Newcomers

Founders:

- Typically pour energy in.
- Tend to be super-responsible – will give a lot to ensure the project's success.
- Are innovative and risk-taking by nature.
- Create the first blueprint – purpose, priorities.
- Almost always have the most rank or power.
- May exclude ideas, people, and ways of working that aren't "like them" (see Enhancing Cultural Competence).
- Can be very identified with the project – "it's me" or "it's my baby."
- Will inevitably contribute their shadow and limitations as well as their gifts.
- Often need support to step back – to work through the process of letting go and sharing responsibility or power (see Seeking Support).
- Sometimes need to be challenged.

Early joiners:

- Help to shape the project.
- Usually have a lot of status.
- Are innovative.
- Are naturally supportive.

Later joiners:

- May need to be invited in (Would you help with this... I think you'd be really good at...).
- May prefer more structure and formal arrangements (see Group Agreements).
- Can increase the group's diversity – but only if the group is willing to shift its culture (see Transition in Group Culture, see Respect for Diversity).
- Often find it difficult to get their ideas considered.
- May find the ways of working hidden. For example: knowing how to put something on the agenda; or how to start a new project; or how to offer to do a role.

Key questions for later joiners include:

- What can I learn or gain, and what can I give?
- What do I need to fully take part? (see Inner Feedback for Personal Resilience)
- What are my gifts?
- What support do I need to fully take part, and when / how can the group provide that? (see Making Space for Uncomfortable Emotions)

Newcomers:

- Are the lifeblood of the group's future.
- Benefit from learning about the current culture, work programme, and ways of working.
- Benefit from being actively welcomed and supported to take their place.
- Can contribute to regular reflection sessions on welcoming newcomers, and what more could be done to help them get oriented.

Key questions around newcomers include:

- Is this group right for the newcomer?
- Is this newcomer right for the group?

Tensions Around Succession

These are some of the common tensions that arise when new people join, and when longer-serving members step back.

Needs of the old	Needs of the new
A culture of urgency, speed, prioritisation	A culture that adjusts to fit members' needs, maybe slowing down for new members
Keeping in the comfort zone of the founders and early shapers	Widening diversity - changing the way the group works (mission, priorities, culture, language, meeting times, meeting places, facilitation and other roles)
Old ideas continue to dominate and don't change (disrespect to the new)	New ideas override what already exists (disrespect to the old)
Anyone is welcome	There are criteria for joining
We figure things out as we go along, and work with informal culture – everyone knows because we all created it together	Formalising how things work by having documented procedures, legal structures, written agreements

While not necessarily bad, these tensions can be difficult to navigate and resolve.

Over the lifetime of a group the tone, priorities, and culture may change. For founders and early joiners this can feel frustrating – what initially felt like a joyful adventure, often with close friends, becomes a slow trudge through an unfamiliar landscape beset with difficult dynamics. An initially radical mission may begin to feel diluted or compromised as later generations with more conventional ideas come in. The dynamics around power and rank may be deeply uncomfortable for founders in particular – who often don't perceive their rank; or whose ideals mean they don't identify as being powerful; and who may not have much experience with exploring the power dynamics in a group (see Unconscious Bias, see Power and Privilege, see How Groups Develop, see Effective Groups, see Seeking Support).

The rewards for engaging with this process of internal change can be great:

- The group can transform so that more kinds of people can become involved, as the shapers and supporters of the group become more diverse (see Transition in Group Culture, see Respect for Diversity).
- Engaging with the dynamics around inclusion, difference, rank, shadow, and change offer huge learning opportunities for the group to create a better world.
- What kind of group intending to do good in the world doesn't take time to address its own internal dynamics?
- What kind of desirable change could such a group ever bring about?
- What if the changes that come about as a result of exploring rank, privilege, and power are beneficial? How might such exploration become a key ingredient of the group's truly radical agenda?

Until the project has gone through at least one generation of leadership (and sometimes even two), it may not be truly sustainable or regenerative. Like a child, it may still be dependent on the founders' charisma, energy, or sense of over-responsibility. When founders truly step back and new people take over, the group has a chance to:

- Clarify the group's mission, vision, and values.
- Find a form or shape that allows the group to be effective.
- Give roles and responsibilities to new people.
- Co-create group agreements so that everyone feels ownership of the group culture, and authentically supports it (see Group Agreements, see Effective Groups).

Activity -Talking About Succession

This activity can be helpful whenever new members join the group. If you can arrange it, an outside facilitator to lead this activity can be very supportive.

Duration:	55 minutes
Participants:	Involve as many group members as possible, no matter what their level of involvement. This activity works best if you have people present who have joined at different times.

Purpose:	To raise awareness around various stages, roles, and issues within the group.
Materials needed:	A space where you can move around as well as sit. The From Founders to the Future resource.
Set-up	Before gathering, share with the group the From Founders to the Future resource that describes stages, roles, and issues. Give people time to read it. You will likely have your own ideas about these stages and roles. Gather people together – you could do this as part of a regular meeting, or have a special event which is more reflective and strategic (like a half-day or one-day for Team-building or to "Reflect And Revitalise").
Flow: 3 minutes	1. Invite everyone to stand in a line in the order in which you joined the group.
5-7 minutes	2.Have a chat with one or two people near you about how it was to join at the time you did.
5 minutes	3. Share the most significant points from these conversations with the group.
5 minutes	4. Invite people in different parts of the line to share something they appreciate about people in another place. For example, those who joined early might appreciate newcomers who take an interest or share the load. **Facilitator note**: To avoid repeating things, use hand signals (waving hands, as in the sign language for clapping) to show when you agree with what someone else says.
30 minutes or so	5. Find a partner who's close to you in the line and sit somewhere nearby. Take 3-4 minutes each for each of the following questions: • How was it to join the group at the time you did? Where was that in the stages on the list? - or was it something different? • Do you recognise yourself in any of the roles? • Do you recognise any of these issues or dynamics during your time in the group? • What is alive in the group now around succession and leadership?
5 minutes	6. Come back together and share with the whole group.

Activity - Telling the Story of the Group

This can be a helpful thing to do when new members are joining, or when the group is entering a period of reflection.

Duration:	20-30 minutes
Participants:	As many people involved in the group as possible: current group members, including staff, volunteers, trustees, anyone with an active role. This activity works best if you have people present who have joined at different times.
Purpose:	To raise awareness around and gain a shared overview of the history of the group: how much the founders have held; how the group weaves people together; how complex relationships in the group are.
Materials needed:	A space with enough room for everyone to stand comfortably. A big ball of string.
Set-up	Invite everyone to stand in a circle – outside if possible.
Flow: 20 minutes or so	1. The founders start by telling the headlines of how the group started – maybe mentioning those who were involved before it was "born." 2. As people who are present become part of the story, pass the string to them, while still holding on to your thread. **Facilitator notes**: Stay with headlines and key moments or it can take forever! It is OK if some people repeatedly have the string passed to them and they end up holding lots of strands. It's also OK if you only hold one strand.

Activity - Fishbowl on Succession

Every group goes through a process of learning how to welcome and empower new members. While it may not be appropriate for a new group that has only recently started to spend time on that, at a certain stage it becomes important (see How Groups Develop, see Effective Groups). Before facilitating the activity, make sure to go through it beforehand. Note that there are two parts, and you could have a break in the middle.

Duration:	60 minutes
Participants:	Everyone in your group, work as a whole group. This activity works best if you have people present who have joined at different times.
Purpose:	To find out where your group is in the process of developing more formal and systematic ways of recruiting or welcoming new members.

Materials needed:	A quiet space with enough room for everyone to sit comfortably. A physical or digital copy of this activity.
Set-up	• Arrange a number of chairs into two circles, one inside the other, with all the chairs facing in. • A good number of chairs for the central circle is 5 or 6. • Those in the central circle will speak, and those in the outer circle will listen from the heart. • Make sure there is always one free chair in the centre.
Flow: 2 minutes 20 minutes 8 minutes 10 minutes	**Part 1 - Hearing from Newer Members** 1. Invite those who joined most recently to sit in the smaller central circle (on chairs). Others sit around in a wider holding circle, intending to listen without judgement or reactivity, with a neutral, curious, and caring attitude. 2. Ask the speakers in the centre: Why did you get involved? What was the experience of joining the group like? What was supportive and what was difficult? If such prompts don't result in much talking, the facilitator can ask these questions directly: • What made you want to join? • How did you find joining this group? • How were you welcomed? • What information was provided that helped? What did you have to figure out yourself? • Was there anything that felt unwelcoming, confusing, or off-putting? • What are you getting from being part of this? and what are you giving? • Is there more that you want from this group that isn't happening yet? 3. When the time is up, those on the outer circle reflect back what they heard – simply repeating back, not commenting, interpreting, or analysing. 4. Reflect on whether there are any actions or insights to capture and write down. **Facilitator tip**: It will feel safer to stay with the story of how and why people joined; and it can be very informative for others to hear about what was good and what was challenging about joining the group.

	Part 2 - Hearing from the Longer-Serving Members:
20 minutes	5. Invite everyone to change places, so that those who have been there longest sit in the centre, being listened to by all the others. Repeat the process with a slightly different focus, with questions like: ● What do you carry for the group? What kinds of responsibility, roles (formal and informal), knowledge, history, contacts, or aspects of the group culture? ● What are you giving, and what are you getting from being part of this group? ● Do you feel listened to in meetings? ● Do you know how to raise something in the group if you're not happy, or have a new idea?
10 minutes	6. After both groups have been heard, come together and debrief how it was to hear the others. Notice if there are things you want to change or put in place about welcoming new members.

Activity – Group Analysis on Founding Culture and Succession

This activity allows you to reflect on how your group has developed; on work the group has been doing recently; and to discuss how roles and responsibilities have been allocated. This relates to a bigger question: how has your group carried out ongoing reflection and evaluation? And how has that been going? This will enable you to identify how well your group has been addressing aspects of succession.

Before facilitating the activity, make sure to go through it beforehand.	
Duration:	60 minutes
Participants:	Everyone in your group, work as a whole group and in small teams.
Purpose:	To reflect on roles and responsibilities, issues around succession.
Materials needed:	A quiet space with enough room for everyone to sit comfortably. A physical or digital copy of this activity.

Flow: (20 minutes)	1. As a whole group, or in small groups, consider the following questions for about 5 minutes each. It can be useful to record the main points on a big piece of flipchart paper, so that you can look at them together at the end.
5 minutes	What was the **group culture** that the founders and early members created? Identify both positives and negatives. You might ask: ● What was valued? ● Who did they bring in that were like them? ● What efforts were made to include diverse perspectives and skills? ● Who was missing? ● How is that reflected in wider engagement with the group? ● How do we feel about this now? Is there anything that might benefit from attention or adjustment?
5 minutes	**Building long-term resilience**. Reflect on what the group has been doing recently (in the past year or so). You might ask: ● How was the work plan created? ● Who initiated the ideas for what to do? ● Whose thoughts were included in the plan? What role did the different people in the group have in generating, shaping, and choosing what was done? ● How might current initiators empower other group members who could begin to become initiators?
5 minutes	**Roles and responsibilities**. Consider what the culture of the group has been around allocating roles and responsibilities. You might ask: ● What roles did people take on, and how were these decided? ● How were people accountable for their role? If they didn't do things they had committed to, what happened? ● How might key roles better plan for succession? ● How much attention did the group give to ○ Recruiting new members at public events? ○ Skilling up existing members? ○ Sharing roles or supporting people to take on new responsibilities? ○ Anything else that helps the long term sustainability and resilience of the project or group?
5 minutes	**Reflection and evaluation** ● How much reflection happened on group process (*How* the group worked)? How much did people feel included, motivated, well-used, and so on (see Task-Process-Relationship)?

	• What reflection happened after the project (if it has now finished)? What lessons were learnt, what decisions made about doing things differently (see Action-Reflection Cycle)? • How much was the goal of empowering new people included in the process of reflection?
5 minutes	2. Once you have done, have a quick **shareback** with the whole group.
(23 minutes)	3. Then break into small groups and discuss the following questions in order to help decide where your group is in regards to succession and what actions may need to happen. Share your answers using the structures suggested – or create your own.
10 minutes	Where is the group in its **life stage**? On a large flipchart paper draw a line with the stages – invite every person to put a shape that shows where they think the group is.
10 minutes	What **issues of succession** are present in the group? List all the issues on small post-it papers, then put them together on a wall or table. Cluster together ones which are similar.
3 minutes	How **serious** are they? Without discussion each person rates each cluster of post-it papers with a number from 1 (not at all serious) up to 5 (threatening the group, or my participation in it).
10 minutes	4. Come back together and harvest what you learned from the exercise. Decide on any next steps based on what has surfaced.

Related Resources

Burnout to Balance
Respecting 'Yes' and 'No'
Inner Feedback for Personal Resilience
Group and Personal Sustainability
Effective Groups
Feedback Culture
How Groups Develop
Unconscious Bias
Power and Privilege
Enhancing Cultural Competence
Seeking Support
Making Space for Uncomfortable Emotions
Transition in Group Culture
Respect for Diversity
Building Bridges
Group Agreements
Task-Process-Relationship
Action-Reflection Cycle
From Founders to the Future

References

Dragon Dreaming - (John Croft)

For more resources like this one, go to https://resources.transitionnetwork.org/
or to the Transition Network international website www.transitionnetwork.org

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