SUCCESSION FOR LONG TERM SUCCESS

People:	Depends on the exercise
Time:	Depends on the exercise
Resources:	This guide and a place to meet.

How can this help us?

Succession is the process of passing over responsibility for "holding" a project and is one of the key issues for long term success. Some might call this a leadership role but it can take many forms. Those who set up a project usually feel passionate enough about it to give a lot to keep it going, but what happens when it's time for them to move on?

Succession can be problematic, some of the common pitfalls are:
- The original group keeps going until they collapse, sometimes taking the whole project with them, perhaps no new members join, or those who come don't step into responsible roles
- New members come, and attempt to step into responsible roles, but the original group finds it hard to let go, sometimes this ends in a kind of battle for controls, I've seen people kill off projects rather than allow a new vision to shape it
- The original founders step away too quickly and new members are left floundering

This guide gives some information that can help a project to move through this process and avoid this pitfalls. It also includes exercises to help a group talk about what can be a sensitive issue.

This will help you to enable a positive succession process that incorporates a graceful letting go, where long serving members are honoured, and newer people are supported into roles of responsibility in an empowering and satisfying way, where there contribution is also appreciated.

The guide:

When is a good time to pay attention to succession?

John Croft, founder of Dragon Dreaming – a technology for groups such as Transition projects – recommends that as soon as someone is in a position of responsibility they start actively looking for a deputy. This makes sense in terms of resilience – that someone else knows what's happening in that role and they would be able to take it on in the future. As a group, it's helpful to pay attention to this long before the originators are exhausted – while there is still some of the original buzz to the group, and still energy to put into finding and supporting newer members, and paying attention to the process of succession.

This process can feel very charged

It's good to know that it's normal for there to be some tensions in this process, the table below highlights some of the issues that can be going on under the surface, unless the group talks about them.

It is good to do a warm up exercise

Because there can be tensions around the question of succession I would always start a process to explore it by talking about it together, sharing previous experience about succession, and any beliefs that may be affecting the group.

Simple exercise to talk about succession

This is best facilitated by someone from outside if you can arrange that, it can be a good thing to do occasionally when new members join. For this exercise it helps to have as many people from the project as possible – those who are actively involved at least. Work in a room where you can move around as well as sit. The following outlines how to run the exercise:

1. Share copies of the table of stages from the founder to future exercise from here: http://transitionnetwork.org/resources/founders-future-inner-transition-activity/ that explains roles and issues and give people time to read it. You will have your own ideas about these stages and roles.
2. Get as many people in the project or group together – you could do this as part of a regular meeting, or have a special event which is more reflective and strategic like an Awayday or Team building day (I've used it in half day or one day "Reflect And Revitalise" workshops with groups who have been going a while.)
3. Stand in a line in the room in the order in which you joined the group
4. Have a chat with one or two people near you about how it was to join at the time you did (5 – 10 minutes)
5. Share the most significant points from these conversations with the group
6. 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 having new people come in and take an interest or share the load
7. Use hand signals (waving hands as in the sign language for clapping) to show where you agree with what is being said – it helps avoid the need to repeat things
8. Then find a partner who's close to you in the line and sit somewhere in the room. Take a few minutes for each of the following (3 – 4 minutes for each person for each question = about 30 minutes)
     • Share how it was to join the project at the time you came. Where was that in the stages listed above - or it might be something different?
     • Do you recognise yourself in any of the roles?
     • Do you recognise any of the issues or dynamics during your time in the project?
     • What is alive in the project now around succession and leadership?
9. Take some time to share thoughts about this in the whole group.

Telling the story of the project exercise:

Gather as many people involved in the project as possible. You can do this with current group members, including staff, volunteers, trustees, anyone else with an active role. It's also a good thing to do when new members are joining, or when you're entering a period of reflection.

The following outlines how to run the exercise:
1. Stand in a circle – outside if possible
2. Have a big ball of string
3. The founder/s starts by telling the headlines of how the project started – maybe mentioning those who were involved before it was "born"
4. As people present become part of the story pass the string to them, holding on to your thread
5. Stay with headlines and key moments or it will take forever!
6. Some people will repeatedly have the string passed to them – so they will be holding lots of strands
7. Others may only hold one strand

By the end you should have a sense of things like
   • How much the founders have held
   • That the project weaves a group of people together
   • That the relationships in the project are complex
   • A shared overview of the history of the project

Fishbowl on succession exercise:

This exercise works if you have people who have joined at different times present. You will need a facilitator to run the process who has read through this guide.

The following outlines how to run the exercise:
   • There are two parts to this exercise and you could have a break in the middle
   • Set out two circles, one inside each other, with all the chairs facing in
   • A good number of chairs for the central circle is 5 – 6
   • Those in the central circle can speak and those in the outside circle listen from the heart
   • There should always be one free chair in the centre

Part 1: Hearing from new members:
1) Set a time limit, e.g. 30 minutes for this
2) Invite those who joined most recently to sit in a smaller central circle (on chairs)
3) Others sit around in a wider holding circle, intending to listen without judgement or reactivity by being in a neutral, curious and caring space
4) Then ask them to explain why they came to be involved and how they found joining the group, what was supportive and what was difficult, hopefully you will get answers to the following questions, if not these questions can be directly asked by the facilitator:
   i) What made me want to join?
   ii) How was it to come into this group?
   iii) How was I welcomed?

iv) What information was provided that helped, and what did I have to figure out?

v) Was there anything that felt unwelcoming, confusing, off-putting?

vi) What am I getting from being part of this, and what am I giving?

vii) Is there more that I want from this group that isn't happening yet?

5) When the time is up those on the outer circle take up to 10 minutes to reflect back what they heard – just repeating back, not commenting, interpreting or analysing

6) Then take a further 10 – 20 minutes to reflect on the meaning for this, and whether there are any actions or insights to capture and write down

Facilitator tips:

- It will feel safer to stay with the story of how people joined, why they came, but the most helpful is for others to hear information about what was good – and challenging – about joining the group
- A useful frame is that every group has to go through a process of learning how to welcome and empower new members – it's simply not appropriate for a very new group to spend time on that, but at a certain stage it becomes important
- The question you're seeking to answer is "where are we in this process of needing to have more formal and systematic ways of recruiting or welcoming new members?"

Hearing from the longer serving members:

Then change round so that those who have been there longest sit in the middle, being listened to by all the others and repeat the process with a different focus:

- Questions to address might include –
  - What do you carry for the group – by way of responsibility, roles – formal and informal, knowledge about history, contacts, 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?
- After both groups have been heard, debrief together on how it was to hear the others, and give time to see if there are things you want to change or put in place about welcoming new members.

Content of the rest of this guide

The rest of this guide explains in more detail issues around successsion and covers the following:

- Insights around founders and new people joining
- Tensions around succession
- Group analysis exercise on founding culture and succession

Insights around founders and new people joining:

Founders:
- Pour energy in
- Create the first blue print – purpose, priorities
- Are innovative and risk taking by nature
- Almost always have the most rank or power
- May exclude ideas, people and ways of working that aren't "like them"
- Can be very identified with the project ("it's me" or "it's my child")
- Super-responsible – will give a lot to ensure the project's success
- Will contribute their shadow and limitations (inevitably) as well as their gifts
- Often need support to step back – to work through the process of letting go and sharing responsibility / power
- Sometimes need challenging as well

Early joiners:
- Help to shape the project
- Have a lot of status
- Are innovative
- Are naturally supportive

Later joiners:
- May need to be invited in (I wonder if you'd help with this.. I think you'd be really good at …)
- May need more structure and formal arrangements
- Can widen diversity – but only if the group is willing to slow down and shift its culture
- Often find it hard to get their ideas heard
- May find the ways of working hidden for example knowing:
- How to put something on the agenda?
- How to start a new project?
- How to offer to do a role?

Key questions:
- What can I learn or gain, and what can I give?
- What do I need to fully take part?
- What are their gifts?
- What support do they need to fully take part, and when / how can the group provide that?

New arrivals:
- Are the lifeblood of the project's future
- Need to listen to the current culture, work programme and ways of working
- Need to be actively welcomed and supported to take their place
- Periodically there should be reflection on how well the group welcomes new arrivals, and what more could be done to help them find their feet

Key questions around this are:
- Is this group for me?
- Is this person right for the group?

Tensions around succession:

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

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

These tensions are not neccessarily bad but as will be discussed next they can be difficult ot navigate and resolve.

A bit about these tensions:

Over the life of a project it's important that the tone, priorities and culture change. For founders or early joiners this is frustrating – what initially felt like a joyful adventure, often with close friends, becomes a slow trudge through a dark forest beset with difficult dynamics. An initially radical mission may feel diluted or compromised as later generations with more conventional ideas come in. And it's possible that dynamics around power and rank are deeply uncomfortable for founders in particular – who often can't feel their rank, whose ideals mean they don't have an identity around being powerful, and who may not have been through the grinding mill of power dynamics before.

The rewards for engaging with this process of internal change are great:
- The project itself will be transformed into something that many more people can be part of as a more diverse group become its shapers and supporters
- Engaging with the dynamics around inclusion, difference, rank, shadow and change are a huge learning ground for the project itself in its own agenda to create a better world.
  - What kind of project intending to do good in the world doesn't have time to address these dynamics itself?
  - What kind of healthy change could such a project ever bring about?
  - In fact changes that come as a result of learning about rank and power, and how to deal with it well may become a key ingredient of the project's truly radical agenda.
- Until the project has gone through at least one, and probably two generations of leadership there's a way it isn't sustainable.
  - Like a child it may still be dependent on the founder's charisma, energy or sense of over-responsibility.
  - When founders truly step back and new people take over the project has to find a form and mission that a wider group own and sign up to.

Group analysis exercise on founding culture and succession:

As a group come together to analyse how the group has developed, reflect on work the group has been doing recently and to discuss how roles and responsibilities had been allocated. This then feeds into a wider question of how your group has carried out on-going reflection and evaluation of how it has been doing. This will enable you to identify how well your group has dealt with succession.

As a group or in small groups consider the following points, it can be really useful to capture main points on flipchart paper, so that you can look at them together at the end, take 5 minutes for each one.

What was the culture that the founders / early members created?

It is important to recognise the culture that the founders of the group created, identifying the positives and negatives, questions that you might ask things like:

- •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 project?
- •How do we feel about this now, and is there anything that needs attention or changing?

Building long term resilience into a group:

Reflecting on what the group has been doing recently (e.g. in the past year) you might ask things like:

- •Creating the work plan
- •Where did ideas for what to do come from?
- •Whose thoughts were included? What role did the different people in the group have in generating, shaping and choosing what was done?

Roles and responsibilities:

Consider what the culture of the group had been around allocating roles and responsibilities, you might ask things like:

- •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?
- •Succession planning
- •How much attention did the group give to the following in how the project was designed?
    - oRecruiting new members at public events
    - oSkilling up existing members,
    - oSharing roles or supporting people to take on new responsibilities
    - oAnything else that helps the long term sustainability and resilience of the project or group?

Reflection and evaluation:

- How much reflection happened during the project on HOW the group worked – whether people felt included, motivated, well used and soon on.
- What reflection happened after the project (if it has now finished) – what lessons were learnt, what decisions made about doing things differently?
- How much was the goal of empowering new people included in the process of reflection?

Once you have done have a quick feedback to the whole group if in smaller groups.

Then break into small groups again and discuss the following questions in order to help decide where your group is in regards of succession and what actions may need to happen. Share your answers using the structures suggested – or create your own.

Where is the group in its life stage? (5 - 10mins small group discussion)
On a flip chart draw a line with the stages on – invite every person to put a shape that shows where they think the group is

What issues of succession are present in the group? (10 – 15 minutes in small groups)
List all the issues on post its, then put them together in a wall or table and cluster together ones which are similar

How serious are they?
Without discussion each person rates each cluster of post its with a number from 1 = not at all serious up to 5 = threatening the project, or my participation in it

Once you have done this come back together and decide on the next steps based on what has surfaced in the exercise.

More support:

For more support and information on developing your core group go here:
http://transitionnetwork.org/do-transition/starting-transition/moving-to-a-core-group/

Check out the 7 essential ingredients of Transition here:
http://transitionnetwork.org/do-transition/starting-transition/7-essential-ingredients/

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End.