

Succession Planning

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I. Overview

Succession planning is not an easy job. There is a lot more involved than simply finding a replacement when your time is up. It's often a multi-year process which involves finding and growing leadership at all levels of the organization, which itself has a predecessor of growing engagement of membership. Thus, succession planning is really the story of engagement.

Section II proposes ten increasing and distinguishable levels of engagement. Section III proposes ten ingredients that elevate a member through that chain of engagement. Finally, Section IV suggests a procedure to increase over all engagement by monitoring levels of individual engagement and pushing members up the chain. Section V concludes.

II. The Ten Levels of Engagement

First, then, let us define ten levels of engagement within an organization.

0. Non-Constituent. Someone who does not fall under the definition of the group.
1. Non-Member Constituent. Someone who falls under the definition, but is not yet a member.
2. Unengaged Member. Someone who is a member but does not often participate.
3. Engaged Member. Someone who is a member and often participates.
4. Potential Volunteer. Someone who could help operate the group (within or even organizing events).
5. Full Volunteer. Someone who helps operate the group.
6. New Leader. Someone who leads an important part of the group (chapter, committee, etc.)
7. Effective Leader. Someone who leads an important part of the group effectively.
8. New Executive. Someone who leads other leaders in the group.
9. Strong Executive. Someone who leads other leaders in the group effectively.
10. Visionary. Someone who can lead the entire group in new directions.

Note that these can be grouped in pairs into six coarser "groupings":

- G1. Constituents belong to the group;
- G2. Members participate in the group;
- G3. Volunteers support the group;
- G4. Leaders run the group;
- G5. Executives grow the group;
- G6. Visionaries transform the group.

Or in pairs once again for three yet coarser "categories":

- C1. Members participate in the group;
- C2. Leaders run the group;
- C3. Executives transform the group.

III. The Ten Ingredients

Next I propose that there are ten distinct ingredients, each taking a person from one engagement level to the next. (Of course in reality it is more complex, but as often is the case in the real world, a simplified model that is “close enough” to reality will guide us towards our final solution.)

0. Non-Constituent. 0 + Qualifications =
1. Non-Member Constituent. 1 + Exposure =
2. Unengaged Member. 2 + Engagement =
3. Engaged Member. 3 + Recognition =
4. Potential Volunteer. 4 + Interest =
5. Full Volunteer. 5 + Time =
6. New Leader. 6 + Skill =
7. Effective Leader. 7 + Influence =
8. New Executive. 8 + Experience =
9. Strong Executive. 9 + Vision =
10. Visionary. Congratulations, you are now obsolete!!

There are several ways to categorize these ingredients.

For each coarse level, there are two ingredients: a “facilitator” ingredient which allows you to step up to the next level, and a “proficiency” ingredient which helps you succeed at it. Facilitators include Exposure, Recognition, Time, Influence, and Vision. Proficiencies include Qualifications, Engagement, Interest, Skill, and Experience.

The ingredients can also be split by level (“category”). The middle ingredients are the core “leadership” section that are often most elusive in planning succession. There are three critical ingredients you need to look for to form intermediate support: Interest, Time, and Skill. Those are the three basics that take you from a Potential Volunteer to an Effective Leader. Then there’s a critical break of Influence (including network, charisma, diplomacy, recruiting, and management) that sends you to the next category up, managing the leaders. That combines with Experience and Vision to form the “executive” ingredients that produce the highest level leaders. The “members” ingredients of Qualifications, Exposure, Engagement, and Recognition are easier to come by, and should already be a part of any functional organization.

Perhaps most importantly, the ingredients can be grouped into four categories based on how they are attained:

- Received: Exposure, Recognition
- Mindset: Engagement, Interest, Influence
- Developed: Skill, Experience, Vision
- Exogenous: Qualifications, Time

IV. Fostering Leadership

So now that we have a framework for engagement, what is the formula for creating leadership and succession? It is simply to keep pushing people up the ladder. Follow the steps below whenever you meet someone in your group. And this means EVERY time – especially for important times like the beginning of the group, recruiting periods, board elections, or succession planning, when this really means 20, 30, 50 times per event.

1. Identify. Identify which of the ten levels of engagement the person is currently in.
2. Push. Try to push the person to reach the next level.
3. Track. Remember those who express interest, whether or not they are yet fully committed.
4. Help. Follow up with those with potential and try to help them overcome any remaining obstacles.

For 4, you should help especially if it’s one of the five or so levels that are more of a mindset (or action) than something learned or an immutable characteristic:

- Received: Exposure, Recognition. Give it to them!

- Mindset: Engagement, Interest, Influence. Change theirs!
- Developed: Skill, Experience, Vision. Mentor them!
- Exogenous: Qualifications, Time. Hope for the best!

Certainly the “received” ingredients are easy to give, whenever they are deserved. “Mindset” ingredients can be harder to change, but one can work on them over time. “Developed” ingredients are an even greater commitment, but need to be cultivated over a long period of time. Finally, the “exogenous” ingredients should be recognized as out of our control. We should not spend much time or energy pushing members who are facing exogenous challenges; recognize these and focus your efforts elsewhere. Lastly, when people are reaching or approaching the Executive level of engagement, make sure to impress upon them that they should be following this engagement paradigm as well, so that they can grow the team underneath them, as well as plan their own succession.

V. Conclusion

To summarize, the basic idea of this proposal is that you continually try to push your members up the engagement ladder. This is done by first recognizing the level of each member, evaluating whether it is possible to push them to the next level, and then giving the appropriate pushes. If it is the right time for that member, they should be given the suggestion and support to elevate their engagement, and their progress should be tracked.

As members become more senior and influential within the organization, they can be given greater and greater responsibilities, overseeing larger and larger portions of the organization. Eventually, they should be given positions that affect the entire organization: for example, executive committee or board level positions. New management positions can even be created to allow for further development. Once they have learned and experienced enough at that level, they are ready to take over leadership of the entire organization.

Congratulations! You are now obsolete!!