

SBCAL



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**SOUTHERN BAPTIST CONFERENCE OF
ASSOCIATIONAL LEADERS (SBCAL)**

Associational Mission Strategist Succession Planning Guidelines

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From the Southern Baptist Conference of Associational Leaders (SBCAL) Study Team Report: There is a need to prepare for leadership transitions within associations. According to the survey we conducted, 90% of current associational leaders are over the age of 50. We encourage current leaders to engage and mentor emerging leaders who sense a call to associational leadership. Further, we encourage current leadership teams within associations to consider the future of their association now and develop plans for healthy leadership transitions.

A Leadership Development Pipeline is Needed

With the struggle many associations are facing now, including an aging corps of leaders and funding challenges for operation and mission, hard decisions must be made as succession is considered. For some associations, once the current Associational Mission Strategist (AMS) departs, the question of survivability will be at the top of the list of concerns. For this reason, preparing well for transition and succession includes casting vision clearly for the work of the association and leading the association to prepare for a future of healthy, effective mission ministry in their location.

Training/Mentoring/Coaching

Associational leaders should work to develop relationships with leaders in and near their associations with a view toward mentoring them for future leadership.

One key curriculum for this training will be the materials being prepared on the SBCAL Study Team Report Proficiencies needed for associational work. With written and video resources available, the AMS can work to train a core group of leaders in his association that will be ready to do effective work whether in a team context or in preparation for the next AMS to serve that association. With a core of key leaders trained and mentored, the association will be in position to move into the future with leadership that is prepared for the future.

Our SBCAL coaching component fits this need as well. Those who are already training for and practicing coaching in their associations have a head-start on the training and mentoring needed for a succession planning strategy.

Emergency Succession Plan

While each association needs to have a plan in place to go through a process toward finding the next AMS, an emergency plan is also needed that would have leadership in place in case of the sudden illness or death of an associational leader. We hope that associational leaders would be able to move through a transition period preparing for their departure and the search for a replacement, but sometimes this is not possible. So, an emergency plan is recommended that would have leadership ready to step into an acting AMS role to help steer the association through a transition time.

William Vanderbloemen has identified four different types of succession: (1) **Emergency**, when a leader's sudden departure due to illness or death forces a leadership transition; (2) **Disqualified**, when a leader has to leave because of a moral or otherwise disqualifying failure;

(3) **Forced**, when a leader has to leave due to conflict with ministry leadership; and (4) **Expected**, when a leader departs in a planned manner from a position of ministry.

These different types of transitions remind us of the sometimes unpredictable ways succession has to be acted upon, and can help leaders be more prepared for whatever comes our way.

Will Heath, with Auxano, has been identified as one of the best resources on succession planning available to us. Two articles he has written are included with this report: “Five Bible Truths to Help in Succession Planning,” and “Five Critical Conversations in Succession Planning.” These documents can help associational leaders begin the conversation about succession planning in a way that will guide their associations toward the best possible results in this important process. David Bowman, AMS for Tarrant Association, Fort Worth, Texas, has worked with Will to develop succession processes for their association. He would be a good contact to learn more about how their association has approached succession planning.

FIVE CRITICAL CONVERSATIONS IN SUCCESSION PLANNING

Will Heath

When the topic of succession planning first landed on my radar (early 2007) there were very few ministry leaders that would entertain the conversation. This was true at both the denominational and local church level. There just wasn't a sense of urgency on the topic. Fast forward to 2016, and the tone has changed considerably.

As this conversation has come to the forefront of leadership thought and conversation I have noticed a concerning pattern develop. **The term “succession planning” is being used as a catch phrase for what is actually five distinct conversations.** This creates a challenge in implementation as there are multiple agendas attached to the same word.

To bring clarity to this conversation we are launching a series that brings codified language to help distinguish what people mean when they reference “succession planning.”

Here are the five different conversations of succession planning.

- Succession Planning as **Protecting Organizational Continuity**
- Succession Planning as **Emergency Transition Management**
- Succession Planning as **Leadership Pipeline Development**
- Succession Planning as **Proactive Exit Planning**
- Succession Planning as **New Leader Hiring**

Succession Planning as **Protecting Organizational Continuity**

When navigating a intentional leadership transition careful thought and energy is focused into what I refer to as the “7-Year Window.” This is the period of time that extends anywhere from 3-5 years before the current leader formally transitions to 2-4 years after. The time preceding the

current leader's formal transition is spent planning, preparing and implementing a transition strategy. The time frame after the formal transition date is focused on settling into life with a new leader.

A brief survey of ministries in the "Succession Planning as Protecting Organizational Continuity" reveals several high level questions that ministry teams wrestle with. Here are five of the fifteen most commonly asked questions during this time.

- Do we have a clear sense of what makes us unique?
- Do we need to address issues related to our governance structure?
- What impact will the transition have on our giving?
- What is the best way to involve our people in the process?
- How can we ensure the successor starts well?

Succession Planning as **Emergency Transition Management**

Emergency Transition Management is a formalized process of making key decisions before an unplanned transition presents itself. I estimate that 80% of the decisions that need to be made in the wake of an unforeseen transition can be decided ahead of time with the right tools in place.

Succession Planning as **Leadership Pipeline Development**

Most secular organizations use the phrase "succession planning" almost exclusively to reference their process of identifying and developing employees that have potential for increased levels of responsibility. Leadership development in a nonprofit context is generally weighted towards equipping volunteers to manage various aspects of program implementation. Increasingly, local churches are focusing on building a leadership culture that equips people to serve both inside and outside their programming structures.

Succession Planning as **Proactive Exit Planning**

Exit planning conversations in the business world tend to revolve around issues related to asset valuation, ongoing ownership structures, and liquidity events. In a nonprofit setting, both secular and sacred, exit planning revolves around funding deferred compensation and determining what a key leader's area of focus will be once they have transitioned out of their current role. This often involves developing a platform to facilitate ongoing coaching, mentoring, or consulting activities.

Succession Planning as **New Leader Hiring**

Ministry leaders often use succession planning as a reference to the search process. Efforts here focus on the developing a profile, identifying and vetting candidates and negotiating offers. Some churches will engage in a professional search firm while others will manage the process on their own.

Many Elders and 2nd Chair leaders feel uneasy about talking with the Senior Leader about their eventual retirement. Conversely, many Senior Leaders become very defensive when the topic of “succession planning” is mentioned in reference to them. This is often tied to the fact people are defining succession in terms of search. In my experience, having language that allows the succession conversation to shift from “search” to “Intentional Leadership Transition” or one of the other three conversations highlighted is all that is needed for the senior leader to engage the process.

FIVE BIBLE TRUTHS TO HELP YOU IN SUCCESSION PLANNING

Will Heath

I'll never forget my very first observation about succession planning.

Succession planning is personal long before it becomes tactical.

This was the “big idea” God used to get my attention in this area. A mentor of mine trusted me enough to open up and talk through the fears he had about his eventual retirement. At the time he was over 10 years away from retiring. The conversation was personal and left a deep impression.

Since that moment, this principal has become a primary filter for serving leaders in seasons of transition.

I like what Marshall Goldsmith wrote in his book *Succession, Are You Ready*.

“Academic” literature generally ignores the fact that CEO’s – and their successors – are human beings. Very little of what is written deals with the “soft” personal issues like relationships, self-interest, ego, or (God forbid) feelings! – Preface: Memo to the CEO, page XIV

His book is written to those in the “C” Suite, but his comments apply to leaders in both secular and sacred nonprofit organizations.

To help you process the personal side of succession planning, here are five biblical passages to read and reflect upon. Take one at a time. Read them slow and in context. Reflect on specific, personal applications. Record your thoughts in a journal. Pray with your spouse.

A Pattern to Follow – Numbers 8:23-26

This is the only passage in scripture that speaks directly to the topic of retirement based transitions. It is God’s instruction to Moses on how to manage the Levite work force as they age. The insights in this passage stand as a stark contrast to how retirement is viewed by those of us living in a western, capitalistic culture.

A Lament to Wrestle With – Ecclesiastes 2:18-21

It seems understandable, natural even, for the leaders that invested their lives to build something would lament the fact that someone else would eventually step into their shoes. Solomon's concerns expressed in this passage seem to resonate in the hearts of many leaders today.

A Change in Identity – Deuteronomy 3:23-29

Mount Pisgah marked a profound shift in Moses' identity as leader. Climbing the mountain, his primary identity as leader was centered around leading Israel into Canaan. Coming down, his primary focus was preparing Joshua and Israel for the day he would no longer be with them. A careful look at verses 23-26 reveal this had been something Moses struggled with for quite some time.

A Desire for the People – Numbers 27:12-23

Numbers 27:12-23 and Deuteronomy 3:23-29 are parallel passages that provide different insights into the same moment – God confronting Moses with his need to implement a succession plan. Even though Moses experienced great frustration in leading Israel, this passage spotlights his genuine concern for their well-being. He was concerned more for their future in his absence than his personal legacy.

A Passion to Protect – 2 Kings 20:16-19

To truly appreciate this specific passage, you must read the full account – 2 Kings 18 – 21:9. Hezekiah's story stands as a profound example of how zeal and passion can diminish over time. At 25 he had the audacity to destroy the Bronze Serpent that Moses build some 700 years prior (2 Kings 18:4). By the end of his career he was willing to trade his personal comfort for the future of Israel. His zeal was gone.

As you study this passage pay special attention to 2 Kings 20:6 and 2 Kings 21:1. God extended Hezekiah's life 15 years and moved the nation into a season of peace and prosperity. It was during this time his son, his successor, was born. Manasseh was 12 when he became King. The son's perspective of God was shaped by his father's leadership while in a season of peace. He never knew his father as man that depended on God. One can't help but wonder how much that played into his attitude toward God during his tenure as King.

A Prayer of Reflection – 1 Chronicles 29:10-19

This is the last, or one of the last, recorded prayers of King David. Unlike Hezekiah, David's passion for the Lord burned bright to the very end. It is not the words of this prayer that make it unique. It is not so different that many other prayers of reflection that can be found throughout history. No, what makes this prayer special is the point in David's life in which he uttered it. Indeed, there are certain prayers that can only be voiced by those who have given their life, their length of days, to the service and glory of God.

I pray these passages would serve as both a source of encouragement and warning as you reflect upon the reality of your eventual transition.

Succession planning isn't the last great thing you will do as a leader. Succession planning is the gateway to your greatest season of influence.

Articles by Will Heath used with his permission, March 25, 2019.

Guidelines prepared by Dr. Bob Lowman, and adopted by the SBCAL Vision Team May 2, 2019.