

Creating Stabilizers and Safety Nets for Successor Executives' High-Wire Act

A research to practice summary of: [McKee, M., and Driscoll, C. \(2008\). "Creating Stabilizers and Safety Nets for Successor Executives' High-Wire Act." *Nonprofit Management & Leadership* 18 \(3\): 341 – 57.](#)

Summary: This paper is a case study in which a large non-profit health care organization with a values-oriented culture faced the impending departure of three of their senior executives, a challenge for which the organization had been planning for four years. The paper utilizes participant observation of management meetings and interviews with the senior administration team and business unit leaders collected over a seven-month period. This case study illustrates a succession planning model structured around the creation of linkage, stabilizers, and safety nets to preserve organizational values and ensure smooth transition.

Who can benefit from this research?: This case study would be helpful for executive officers and teams in the beginning stages of executive succession planning.

What are the primary findings?:

The findings of this case study oriented around the identification of a model for succession planning built around eight strategies for reinforcing the organization in preparation for success.

The first half of this model centered on the linking of different aspects of the organization and the creation of stabilizing forces to ensure a smooth transition:

- The “relay succession” approach to succession planning, when the outgoing executive selects and grooms a successor from within the organization, lays the groundwork for a smooth transition by ensuring that the successor is already highly committed to the organization and prepared for the position. This strategy does, however command that the outgoing executive dedicate a great deal of great deal of time and energy towards preparing their successor.
- Organizing and linking strategic business units creates a flexible and collaborative organizational structure that is much more prepared to adapt to new leadership.
- Creating a strategic plan linked to the succession planning process helps to solidify business goals and organizational values by providing remaining executives with a road map that they can then later to ensure that the organization remains true to its stakeholders and values.
- Participative leadership styles that foster collaboration and participation allow remaining executive to develop competencies and skills that maintain stability through succession.

The second half of the model centered on the creation of safety nets for succession to prevent a departure from organizational values:

- Beginning succession planning multiple years prior to departure prevents succession from upending an organization by allowing enough time for preparing organizational structures to endure transition.
- Choosing successors who strongly align with the organization’s existing values ensures not only the continued endurance of organizational values but successor retention.

- Entrenching organizational values through values-oriented management and decision making helps to ensure that the remaining executives continue to identify with and work toward those values.
- Utilizing an executive coach that works with the executives individually and as a team, helps to develop a unified approach to problems and decision-making while also setting up an enduring support resource.

What type of organization or mission might make the most use of this research?:

- This case study is centered on a non-profit health care organization; however, the findings are not specific to that field and could be relevant to a wide variety of non-profits.
- The model presented in this case study relies on the presence of a strong executive team possessed with the resources to employ executive coaching. Therefore, this case study would likely be most helpful to a larger organization with the means and personnel to implement such a model.
- As this case study centers on an organization with a strong emphasis on organizational values, it would be particularly applicable for an organization with a similarly values-oriented culture.

When would this research be useful?: As the actions and structures of the succession model presented by this case study require multiple years of implementation, this research would be most useful to an organization that is in the early stages of succession planning.

How does this research inform practice?:

- While the literature has shown that succession planning is often marked by concern among those set to remain, this case study shows that the implementation of stabilizers and safety nets can help to reaffirm values and maintain confidence in the future of the organization.
- This study provides a succession planning model for executive officers and administrations that successfully balances the strategic and values-based needs of a non-profit in the midst of executive transition.

Keywords: succession planning, organizational values, nonprofit executives, executive transition, strategic planning